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# **Association Development Consultation**

Market Access Program/Development Alternatives Inc.  
Contract #294-C-00-99-00060-00  
USAID West Bank/Gaza Strip

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July 2000

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# **Development Alternatives Incorporated (DAI) Market Access Program (MAP)**

## **Association Development Consultation June-July 2000 Mission Final Report**

### **Background**

DAI's Market Access Program (DAI/MAP) was established to work with the public and private sectors in the West Bank and Gaza to develop a new economic paradigm to promote a friendly business environment, attract foreign investment, stimulate innovation and increase market share and exports for targeted Palestinian business sectors.

The overall objectives of this initiative have been to increase competitiveness, sales and trade outreach for those Palestinian firms represented by the targeted sectors. To support fully these business sectors, DAI/MAP focuses its efforts in three areas:

- service delivery  
technical support is provided to individual companies seeking to improve their overall operations and profitability
- policy management  
provide consultation and guidance in the development of the legislative and regulatory policies and procedures required to promote a positive and productive business environment for private business
- organizational development  
establish or strengthen membership-based business organizations (MBBOs) to serve as the conduit to affect change for the selected business sectors

The goal of this initiative is to create sufficient competencies among selected business groups within both the public and private sectors to ensure the ongoing economic development in the West Bank and Gaza. The focus of this report details the efforts directed toward the further development of three membership-based business organizations: Union of Stone and Marble (USM), Palestinian Information Technology Association (PITA), and the Wood Industries Union (WIU).

### **Association Development Consultation**

#### **Mission Goals**

In a previous mission, efforts were directed toward creating a comprehensive assessment designed to guide the organizational growth and development of three membership-based business organizations in the West Bank and Gaza. This assessment was based on a set of organizational development principles, processes and practices proven effective within membership-based organizations in the United States. Critical to the mission was the establishment of a strategic plan that focused on priorities and initiatives needing attention within twelve to eighteen months. The objectives, strategies and tactics selected were all selected toward helping the membership-based organization achieve self-reliance. The outcome of the first mission proved successful, with positive feedback and response to the changes that occurred as a result of the support provided by DAI/MAP professional staff and the organizational development consultant.

To continue supporting the development of these three membership-based organizations, it was felt that additional support was needed to create management tools, policies and procedures to help further strengthen their overall capacity. A part of this effort also included identifying the programs, products and services needed to attract and retain active dues-paying members.

The following goals were established as anticipated outcomes for this mission:

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- assist one association (Union of Stone and Marble) in establishing and implementing a membership recruitment campaign and define a set of targeted member services that will strengthen the perceived value of membership.
  - design a set of six training modules focusing on association management (1.5 hours in length) for use by DAI/MAP with current project staff, board members, selected volunteers and association staff; conduct at least three modules on-site (two for associations and one for DAI/MAP staff).
  - provide a coaching session, four hours in length, on the design and delivery of interactive training to at least three but no more than five DAI/MAP staff (Institutional Development Specialist, sector coordinators, etc.).
  - support the Institutional Development Specialist with commentary and suggestions on the written documentation submitted by the selected subcontractors of their general approach, methodology, collection, development and formatting of copy to fulfill requirements outlined in the subcontractor scope of work; provide limited review and editing support while on-site.
  - provide consultation support to the Institutional Development Specialist, including participation, review and limited editing of the planning documents created for the Wood Industries Union (WIU) and the Palestinian Information Technology Association (PITA); plan will guide DAI/MAP to determine initial support in addition to identifying a time line for each to achieve self-sufficiency.
  - prepare a report outlining progress and need for further modifications to the original set of recommendations.

### **Expected Deliverables**

From these mission goals, the following outcomes were expected:

- design and implementation plan for the membership recruitment campaign (for USM)
- methodology, design and implementation plan for newly identified services for the Union of Stone and Marble
- set of six training modules focusing on association management
- guide packet for coaching session on training design and delivery
- final report

This document outlines the steps taken to achieve the mission goals and develop the expected deliverables. Materials designed for this mission are noted in the report and included in the appendix.

### **Methodology**

To ensure a successful mission, the following steps were taken:

1. Debriefing conducted with DAI/MAP staff of the progress achieved by the three membership-based associations from the previous mission.
  - checklist of information required to support mission created
  - available information and assess best approach to achieve mission goals reviewed
  - methodology for the planning and implementation of tasks drafted

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2. Reviewed and collected appropriate association materials to support mission goals and desired deliverables.
    - copies of appropriate samples, reference materials and other pertinent information related to mission goals were identified and collected
  3. Conducted intensive on-site work with three membership-based business organizations.
    - areas of desired support (other than those specified in the scope of work) from three key membership-based business organizations were identified
    - supplemental materials as needed to support special requests were prepared
  4. Designed and delivered training materials to targeted groups.

For volunteer and staff leaders of membership-based organizations

- six association management topics for training were identified
- conceptual outline for six topics were drafted
- course outlines, participant's handouts, and facilitator's guide for three modules were prepared
- day-long session with volunteer leaders and professional staff from membership-based organizations and DAI/MAP were conducted

For DAI/MAP staff development

- topic for DAI/MAP staff intensive "coaching" session was identified
- participant materials for session were prepared
- four-hour session with DAI/MAP staff was conducted

5. Reviewed and provided on-going consultation on the drafting of a policy and procedures handbook prototype for use with DAI/MAP's membership-based business organizations.
  - draft text received prior to departure as well as on-site was reviewed and analyzed
  - developmental meetings with DAI/MAP and subcontractor staff, offering comments and suggestions as appropriate were held
  - a comprehensive outline and standard format for the development of the handbook was created
  - comment of the revised text was provided
6. Provided post visit follow-up.
  - remaining training module topics with DAI/MAP staff were confirmed
  - review and comment of revised policy and procedure handbook prototype was provided
  - remaining materials for modules were developed
  - final report including all supplemental materials was drafted

The support provided to achieve mission goals is reported in the following manner:

- for each membership-based business organization
  - Union of Stone and Marble
  - Palestinian Information Technology Association
  - Wood Industries Union
- for each training effort
  - full-day leadership development session
  - half-day coaching session

## **Association Development of Membership-Based Business Organizations Within the West Bank and Gaza**

### **Overview**

As in the for-profit sector, membership-based organizations need efficient principles, processes and practices to operate effectively. While these not-for-profit membership-based organizations have been in existence for literally hundreds of years, little research has been conducted to learn what principles, processes and practices will ensure the achievement of desired outcomes. This has led the not-for-profit community to reach out to the business community for defined models of the same. This practice has been and continues to be seen by many as an appropriate

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technique. But others are recognizing the negative consequences of incorporating these principles, processes and practices completely. By using these techniques directly, many membership-based organizations have unwittingly transformed themselves from member communities into businesses. As a result of doing so, have transformed their relationship with their constituents from members to customers. This transition has had a dramatic affect on fundamental program areas within the organization including: membership development, member involvement and leadership development. Many members have become more disengaged from these organizations, using them solely to purchase goods and services but not recognizing the full value the organization can provide through active involvement (e.g. volunteerism and leadership).

Membership-based organizations must operate in a fiscally responsible (business-like) manner. Membership-based organizations, however, must never forget the reason they were established – to support the growth and success of the profession, industry or cause represented and those involved in it. Successful membership-based organizations must remember one thing: the programs, products and services provided should always be directed at enabling the member to achieve their personal and professional goals. This mission is achieved not only by providing programs, products and services to members but also guiding members to become active participants in the organization through volunteerism and leadership.

The systems designed to support the three membership-based business organizations are based on selecting and adapting those principles, processes and practices from the for-profit sector that are most appropriate to help these organizations achieve their stated vision and mission.

## **Union of Stone and Marble (USM)**

### **Background**

The Union of Stone and Marble (USM) was established about four years ago. In 1999, it represented close to 400 companies while the potential universe reflects approximately 1100 companies. Membership dues (\$150 initiation and \$300 annual fee) have been and continue to be the main source of income. At pivotal times, members have been asked to make personal contributions when shortfalls occur. The main office is located in Bethlehem with two branch offices in Hebron and Nablus. Different levels of staff provide support to each office.

During the first mission, DAI/MAP staff, with support from the organizational development consultant, assisted USM in developing a strategic plan that outlined key areas requiring attention to ensure its continued future growth and self-reliance. A large part of the plan focused on increasing the perceived value and satisfaction among members through the development and delivery of programs, products and services. It also outlined the strategies and tactics that would enable USM to become even more proactive and aggressive in supporting the development of public policies and regulations required to foster a more productive business climate. The plan also addressed the need for the organization to represent the industry more fully through increased membership. As such, identifying and recruiting new members was a priority. At the conclusion of the mission, a master and six month plan was completed. USM needed to create a monthly work plan that would outline when and how the tasks would be completed as well as the resources (e.g. budget) required.

In reviewing its progress prior to departing for the subsequent mission, it was not clear that USM had the opportunity to create this work document or outline the resources required to implement it. USM had been unable to complete this step due to the pressures and demands of preparing to attend an international conference and exposition.

### **Current Mission**

To further support USM, the focus of this mission would be three-fold:

- assist in identifying a package of member services designed to support member need
- assist in outlining and implementing a membership recruitment campaign
- provide consultation support toward the development of a policy and procedures manual prototype customized to support USM's specific governance and management infrastructure

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USM's annual and six month plans were used as a guide to accomplish the mission goals listed above. It was felt that through its use, it would redirect attention back to using the planning document as a tool to guide USM toward self-reliance. In addition, USM had developed a preliminary organizational structure defined by the following functional areas: training, marketing, technical affairs, corporate affairs and information. These functional areas would be used as a guide when developing and categorizing programs, products and services for members.

### **Developing a Member Services Package**

In establishing a formal set of programs, products and services, the following methodology was established:

1. created a baseline definition of a member service
2. defined current tangible and intangible programs, products and services
3. established more thorough understanding of member expectations and needs
4. identified potential short and long-term programs, products and services for USM consideration
5. prioritized and selected those most appropriate for inclusion in current budget cycle
6. estimated budget requirement for implementation
7. identified source by which program, product or service will be supported (e.g. member dues, contribution, grant, fee for service, etc.
8. identified possible vendors for services
9. identified possible scope of work for vendor review and submission

Steps 1 through 4 were completed during the mission (Appendix I). The remaining steps were not completed during the on-site visit due to factors internal to USM management<sup>1</sup>. This report includes further instruction and samples for completion at USM's discretion.

### **Member Services**

#### **Current**

USM defined a member service as "anything that benefits a member directly or indirectly." This is a broad definition allowing USM full creativity and freedom in developing a member services package for its constituents. The current set of member services includes the following (details found in Appendix I):

#### **Tangible**

<b>Program, Product or Service</b>	<b>Description</b>
Newsletter	bi-monthly publication of news and information about the Union and the industry
Exhibitions and Trade Fairs	Exhibit USM and members' businesses at targeted domestic and international fairs and expositions
Membership Directory	list of member companies
<b>Program, Product or Service</b>	<b>Description</b>
Education: Seminars, Workshops, and Training Courses	educational opportunities for members on topics representing technical and business topics
Visa's and Travel Permits	support member's need to obtain documentation required to travel and export raw and finished materials

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<sup>1</sup> The USM Executive Director's contractual agreement with the USM leadership was under review; the outcome of that negotiation at the onset of the mission was unclear.

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General Assembly Meeting	annual meeting of the full membership to gain insight on accomplishments made by USM on members' behalf
Industrial Marketing Materials	multi-lingual four-color marketing materials promoting the acquisition and use of Palestinian stone and marble
Branch Membership Meetings	routine sessions sponsored for members at branch level
Business Development Matching	special programs that help members to participate in trade fairs, expositions, and other key events that help them expand their business opportunities
Export Development Program	intensive program that offers limited number of members the opportunity to become export-ready
Member Survey	information gathering effort that solicits member expectations and needs
Insurance Program	member affinity program that provides a wide range of insurance programs to members
Trade Missions	members are invited to participate in events welcoming or visiting foreign dignitaries to discuss possible business development opportunities
Library	set of references available for member review and retrieval on topics of critical interest to members in this sector

#### **Intangible**

<b>Program, Product or Service</b>	<b>Description</b>
Advocacy	representing member interests in the public sector
Arbitration	resolves disputes, misunderstandings among members and their vendors
Business Reputation Support	provides recommendations on the reliability and dependability of USM members and their clients
<b>Program, Product or Service</b>	<b>Description</b>
Clearinghouse	acts as an agent in giving names of member companies for outside requests for products

Information gained during the first mission suggested that USM had a wide range of programs, products and services. It was unclear whether or not these programs, products and services were actually responsive to member needs as the number of members participating was smaller than the actual membership. Additionally, USM had few opportunities to communicate to members the vast array of services that did exist along with guidance on how to use

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them to make the most of their membership. An annual calendar was established showing the range of programs, products and services already in place albeit not operating consistently or routinely (Appendix II).

During this mission, DAI/MAP staff and the organizational consultant had the opportunity to obtain preliminary results of a recently conducted survey (Appendix III). Its contents, while sparse, provided an opportunity to gain a sense of what members felt were their priorities. When asked to identify the problems faced, responses from all branches reported marketing and maintenance as important. Responses from at least two of the branches reported administration, quality control, exporting, taxes and transportation as important. A wide range of challenges were given by responses from only one branch leading one to assume that regional differences do exist. As such, USM must recognize that these differences will have a significant impact on how members view the value of the organization.

USM members indicated that getting “support for electricity rates” was an expressed need voiced by all branches. Responses from at least two branches indicated that getting marketing support, permits for travel and exportation, and helping unify prices were issues in which members expected some relief of support. With those responses in mind, the following recommendations were made for review and consideration by the USM volunteer and staff leadership.

### **Recommendations**

In order to maintain member satisfaction, an organization must provide a package of member services that is responsive to member needs and expectations. The challenge for an organization is to create a package that not only provides that support, but also generates revenue for the organization. USM had established a good framework of member services. What seemed lacking was more effective and consistent communication of these services to its members. Secondly, it delivered most services at no additional cost to its members. Since few members were taking advantage of these services, the impact was not severe on the organization’s overall budget. USM would not be able to continue to provide this level of service if the demand increased with more member participation.

Rather than merely increasing the number of services offered by USM to its members, a set of recommendations were provided that enhanced existing ones. The intent was to maximize the program, product or service in a way that would cultivate member involvement and help generate revenue for USM’s overall budget. In that way, USM could provide a solid set of services and generate sufficient revenue to achieve self-sufficiency.

A few examples of what was proposed to USM are listed below (more comprehensive report in Appendix IV).

<b>Service</b>	<b>Current</b>	<b>Enhanced/Income Generating Suggestions</b>
Seminars	seminars are scheduled as the need arises	create an annual education program that offers four types of learning opportunities: USM sponsored full day sessions (4 per year) business development clinics (2 per year; 8-12 sessions) branch sponsored half-day sessions (4 per year) roundtables (4 per year)  income: registration fee to participate
General Assembly Meeting	meeting with the entire membership, conducted annually in preparation for elections of USM leadership	as part of the meeting, invite vendors to set up displays (table top); consider offering carefully selected product demonstrations prior or after the business meeting; create and distribute vendor support list that can be used as a reference for the remainder of the year  income: vendors pay an exhibit fee

A suggested timeline (3 year period) for implementing the set of member services was suggested (see Appendix V).



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While working on this project, DAI/MAP staff were also exploring ways to offer a package of affinity services (e.g. gas discount, travel permits, bank credit, cellular phones, office equipment, etc.) to all the membership-based business organizations through a central source (e.g. Paltrade). Those ideas relevant to this focus were outlined in the recommendations with regard to external coordination and implementation. This approach would allow organizations a stronger negotiation position when establishing the terms of the group service. If, however, a decision is made not to work with a central organization, it is recommended that these services be pursued by USM.

The report was well received when presented. Moving from an informal to a formal system can be overwhelming. In making this transition, the whole culture, environment and work pace of the office would be affected. It was not clear at the conclusion of this part of the mission whether or not the USM executive staff<sup>2</sup> was committed to making this transition. However, without doing so, it is doubtful that this organization will achieve self-sufficiency. No further support was requested to begin implementing the first phase of this project.

For USM to become self-sufficient and self-reliant, it will need to make a decision to complete the following:

- establish a formal set of programs, products and services for members
- establish a budget reflecting anticipated income and expenses for each (Appendix VI)
- identify strategies for promoting it to members
- establish a process for evaluating progress, making budget adjustments to ensure fiscal responsibility

### **Recruitment Campaign for New Members**

While generating non-dues revenue is critical for the USM to gain self-reliance, maintaining a strong membership is pivotal. Membership is often termed “the lifeblood” of the organization as members play a direct role in using (and benefiting from) services as well as provide volunteer and leadership support. Most of the organization’s financial support is derived from its members. But getting and keeping members is not something an organization can take for granted. To be effective, an organization must establish membership development as a priority (dedicating time and resources to it). It must become aggressive at best, assertive at least if it is going to attract and recruit the types of members that will remain with the organization as long as they remain in the business sector.

USM received a rather surprising blow last February 2000 when less than half of their current membership renewed. At the time, some who were informally interviewed indicated that they and others simply did not see the value received for their dues. This unfortunate blow to the organization was a clear example of what happens when it is not sensitive to the needs and expectations of its members.

The goal of this part of the mission was to establish and begin implementing a recruitment campaign to recruit new members and reinstate those members who had cancelled their membership. The USM executive staff, DAI/MAP and the organizational development consultant met to assess the current status of membership, brainstormed desired end results, and established strategies to achieve them. It was determined that USM needed at least 100 new members by the end of this year in order to help offset its deficit spending. Developing a membership development campaign would also enable USM to fulfill some of the objectives and strategies in their annual plan (Appendix VII).

### **Recommendations**

A member-get-a-member campaign was recommended as the best strategy for recruiting new members for the following reasons:

- profession does not have a wide range of print or electronic media to promote USM in a passive way
- personal contact is a more effective strategy in a culture based on building good relationships
- members have an opportunity to learn more about their own membership as they explain benefits and services to prospective members
- requires least expenses to implement (financial)

An outline of considerations was drafted and presented to the group for review (Appendix VIII). The idea of conducting a short-term membership campaign for new members was received well. A general concern about

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<sup>2</sup> In August, the USM Executive Director notified the Board of Directors of his decision to leave the organization as soon as a successor is selected.

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scheduling the campaign for the appropriate time became problematic. It was felt that the campaign could and should be coordinated with an upcoming USM special event (ground-breaking of the new office) in August, 2000. While that may have been true, it broke the momentum of this project. No reports have been received to date whether or not the campaign actually has been received.

The current state of affairs in this region suggests great difficulty in moving forward on efforts of this kind. When current conflicts subside and business is allowed to resume, this organization will need to focus once again on membership development. To support those efforts, a checklist is included in this report to guide the development of such a campaign (Appendix IX).

### **Policy and Procedures Manual (Prototype)**

Because organizations are systems, they require a set of processes and procedures to maintain effective operation. Formalizing informal policies and procedures becomes critical as organizations grow and require more structure to operate effectively. USM is no different. This is necessary for several reasons:

- people bring different values, perspectives and experiences to the organization
- as the number increases, the potential for the organization to lose its original focus increases
- opportunity to orient or provide training to volunteer and staff leaders is often difficult; having guidelines provides some direct support and training
- provides consistency of support and service through any transition (volunteer or staff leadership)

The most important policies and procedures identified as needing to be established were in the administration/management (including finance), governance, and membership development areas. A very specific scope of work was awarded to a selected sub-contractor. Within the context of this mission, the role of the organizational consultant was to provide feedback, suggestions and general counsel on drafts created by the subcontractor.

This part of the mission proved to be the most challenging for several reasons:

- USM's need to have support materials in as expeditious fashion as possible
- unfamiliarity of most of the content by the subcontractor
- eagerness of the subcontractor to draft copy prior to establishing a content outline (as specified in the scope of work)

While working on-site, it was agreed that the project was progressing without a guideline for measurement. A content outline needed to be and subsequently was developed by all parties involved. This outline then served as a guideline for drafting copy to support the topics outlined in the scope of work. The majority of the revisions for copy drafted prior to the outline were adjusted after the consultant's departure. These versions were reviewed with comments shared directly with the Institutional Development Specialist by electronic mail. This type of project generates a great deal of paper as first, second, and sometimes third drafts are often required before consensus is achieved that the content is acceptable. Since the comments generated during this part of the mission were content-specific and would not make sense if read out of context, they are not included in this report. Copies will be made available upon request.

### **Recommendations**

DAI/MAP staff (Institutional Development Specialist) has done a remarkable job in managing a project that has included managing multiple writers, facilitating meetings, achieving consensus, and providing overall project management. It is a very large and less than exciting one but critical to the future success of membership-based organizations in Palestine. At the time of this report, the project is nearing completion. DAI/MAP may want to consider the following:

- conduct a debriefing with the DAI/MAP staff involved in the project to assess the project, evaluate the working relationship with the subcontractor and identify areas for improvement when working with subcontractors in the future

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- conduct a debriefing between DAI/MAP and the subcontractor to assess the scope of work, evaluate the working relationship, and identify strategies that might ensure more successful outcome of projects of this kind in the future
  - share copies of the current prototype with other membership-based business organizations to assess the perceived value and explore necessary adaptations for use (this is already underway)
  - meet with USM volunteer and staff leadership to present the material and discuss its value and use to help the organization achieve self-sufficiency

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## **Palestinian Information Technology Association (PITA)**

### **Background**

The Palestine Information Technology Association (PITA), located in Ramallah, was established in September 1999 by a number of businessmen interested in shaping the information technology sector in Palestine. PITA currently represents approximately 40-45 members. Members interested in joining or renewing pay five hundred dollars in dues. Board members have been serving in both the management and governance areas until recently. Other members have expressed interest in getting involved, but without an annual plan in place, delegating has been difficult. At the time of this report, it was reported that the group is ready to welcome a full-time executive.

PITA believes it has focused its efforts successfully at establishing a presence within the sector. They expressed an eagerness in positioning themselves as a significant player on issues critical to developing policies supporting the IT sector in Palestine. Most of their efforts in their initial stages have been directed at handling policy issues (legislative or regulatory). While they have used the technology available to them to communicate with their members, they have also recognized that their members may not see the initial return on value. The leadership is concerned that many members will not understand the importance of the policy work that has consumed their time. As a result, they are eager to establish more concrete short and long-term programs, products and services that will provide immediate support to their members. That is the focus of the support within this mission.

### **Current Mission**

To further support PITA, the focus of this mission included the following:

- develop an annual plan
- outline a membership recruitment campaign

### **PITA Annual Plan**

A small representative group of leaders met on July 11, 2000 in Ramallah to work with DAI/MAP staff and the organizational consultant to transform the objectives (from the bylaws) into strategies. The project was successfully completed (Appendix X). The leaders involved agreed to distribute the document to the entire leadership for comment. The plan outlined a series of actions seeking to accomplish the following:

- represent the interests of its members in business and advocacy areas
- enhance market opportunities for the sector
- improve product quality allowing member companies to trade on the international level
- protect intellectual property rights
- facilitate cooperative business opportunities with other business sectors
- provide a wide range of member services to support other member needs and expectations

### **Recommendations**

Establishing a plan is relatively easy. Transforming the plan into a working document for volunteer and staff leaders is difficult. The leadership developed a document that outlined a comprehensive approach to achieve their goals. If the document remains in its current form, it will serve only as a reference to the leadership. The document needs to be broken down further to include the following:

- a series of tactics (tasks) for each of the strategies
- proposed timeline for completion of each tactic
- individual who will be responsible or serve as the key contact for the effort
- proposed resource requirements (income and expenses)

From this document, an operational budget can be established. It will help define for PITA and DAI/MAP on how this organization can achieve self-reliance and self-sufficiency. Many organizations will designate a leader on the board of directors to serve as the plan monitor. That individual reports on plan progress at each board meeting. In this way, the plan becomes more than a document, it becomes a guiding tool for the organization to achieve its goals.

### **Membership Recruitment Campaign**

In addition to establishing an annual plan, PITA's leaders wanted to explore how to plan a membership recruitment campaign. Additional time was dedicated to reviewing approaches that would generate the best response. From the

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discussion, an outline was created that could be used to plan a recruitment campaign for new members (Appendix XI). The checklist developed for USM could also guide PITA's membership development efforts.

### **Recommendations**

Before launching into the campaign, the leaders of PITA recognized the importance of evaluating their current member service package against the known needs and expectations of the types of new members they were seeking to recruit. This is a critical step. If not done, PITA risks dedicating limited resources toward recruiting members who may not find the organization to be of value for their specific needs. Many organizations find members more receptive to joining an organization during the following months: January, March/April, and September. These months tend to reflect natural times when individuals seek to make personal or professional changes. PITA has the opportunity to organize over the next several months (assuming a more stable environment) and launch a campaign in January that also coincides with the beginning of their membership year.

Many organizations in the United States are realizing that a successful membership recruitment effort does not end with receipt of the dues payment. That payment only signifies the conclusion of one stage in the membership development process. They are recognizing that membership development is indeed a process that begins with identifying the right type of potential member (prospecting), proceeds by inviting that individual to become part of the organization (recruiting), then takes time instructing the individual on the best way to make the most of the membership (orienting) and finally, continues the communication of value by informing the member on how to fully maximize the membership experience to achieve their personal and professional goals by becoming more active (involving). Those organizations that provide strategies to support each of those steps find greater success in getting the member to renew their commitment (renewing).

In order to ensure both short and long-term growth, PITA needs to plan a series of strategies that will both instruct and inform the members they are recruiting. The new member orientation, planned in conjunction with the new member recruitment campaign, should include the following:

- personal contact with the new member offering guidance on what being a member means and how to make the most of the membership
- written materials that serve as a reference and a guidance for members, outlining steps on how to make the most of their membership experience
- frequent personal or electronic attention and follow-up by volunteer leaders and staff in the first three to six months to evaluate if the new member has taken advantage of his/her membership and encourage more

The first year renewal of members is the most problematic for membership-based organizations as this group generally reflects the lowest of all renewal rates. In order to ensure that a larger than normal percentage of these members renew, membership-based organizations must pay extra attention and take extraordinary steps to help these professionals understand what being a member means and learn how to gain the most value from the experience. By conducting thorough new member orientations and paying close attention to them in their first six months of membership, PITA has an opportunity to positively impact this common trend.

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## **Wood Industries Union (WIU)**

### **Background**

The Wood Industries Union (WIU) was established in October 1999 by a group of businessmen interested in establishing an organization designed to represent owners of the furniture manufacturing industry. Since the first organizational development consultant's visit in February, 2000, this organization has nearly doubled its membership (from 55 to 130 members as of this report). The success can be attributed to WIU volunteer leaders and DAI staff making personal contact with prospective members as part of an information-gathering member survey project. The dues payment to join this organization is a modest fifty dollars (\$50.00) per year (additional \$100 initiation fee the first year). Members continue to meet informally to network and socialize at the Union's office (or other agreed upon locations). This activity has had a significant impact on the Union's ability to communicate with its members. More recently, the WIU hired a full-time executive manager, an individual possessing experience in managing non-profit organizations.

### **Current Mission**

To further support WIU, the focus of this mission was two-fold:

- developing an annual plan
- establishing a potential list of member services

### **Annual Plan**

The DAI/MAP Institutional Development Specialist, DAI/MAP Gaza staff and the organizational development consultant met at the DAI/MAP Gaza office to outline a set of strategies and a timeline (from 6 to 18 months) to achieve WIU's organizational objectives. The DAI/MAP Gaza staff, in cooperation with WIU volunteer and staff leadership, completed the plan by establishing a series of tactics to further define the work required to achieve desired goals (Appendix XII).

### **Member Services**

Additional time was spent identifying member needs and brainstorming a potential list of member programs, products, and services that would be most responsive (Appendix XIII and XIV). At the time of this report, it is unclear whether the information on these documents has been reviewed, evaluated and incorporated into the overall plan.

### **Recommendations**

With the support of DAI/MAP in both Ramallah and Gaza, the WIU volunteer leadership has demonstrated a remarkable ability to overcome both traditional and non-traditional obstacles to enjoy membership growth and experience increased member involvement. The attitude among the volunteer and staff leadership involved in this organization has played and continues to play a significant role in identifying, attracting, and mobilizing others to become involved and active. While the current violence in the region may hinder WIU's ability to move forward at its original pace, it is doubtful that this organization will lose its drive and intensity. As peace negotiations allow the region to become focused once again on business development, it is anticipated that WIU will be able to regain its original momentum. Until then, WIU might consider the following:

- secure a volunteer leader to participate with WIU and DAI/MAP staff as a plan monitor (president is often too busy to serve in this role, a junior officer is often a good candidate to assume this role as it helps generate ownership and commitment to implementing the plan in the present and future)
- review the plan making adjustments to the timeline as needed
- review the information regarding potential new member services and incorporate those most appropriate into the plan
- establish resource requirements necessary to accomplish plan objectives
- establish an operational budget that reflects resources necessary as well as anticipate income to be generated to achieve goals (including funds needed to staff and operate the office, etc.)
- select those strategies and tactics from the plan targeted for completion by the end of the year
- create a work plan that identifies in greater detail when tactics will be accomplished (either weekly or monthly)
- establish routine evaluation and communication of the plan's progress at key leadership meetings

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WIU has experienced great success in recruiting new members in the past year. Part of its efforts in the next six months should focus on helping these members learn how to use the organization as a tool to help them achieve their personal and professional goals. As indicated earlier, guiding members in their first year of membership is critical. Unless guided and encouraged, most members will only pay attention to their immediate personal and business needs and not to seeking external support. The Union needs incorporate those strategies and tactics that will secure their members' attention and cultivate their awareness on how to access the organization's programs, products and services to support their success. Members need to learn that once they define their business challenges, WIU can show them how to match those needs to its programs, products and services that will be of greatest support. Additional strategies, information and support (e.g. U.S.-based samples) can easily be provided when WIU is ready and able to address this issue.

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## **Volunteer and Staff Leadership Development Opportunities**

### **Background**

One of the greatest misconceptions that exist about being a volunteer leader is that those members who serve understand their role and responsibilities; that they know how to act accordingly. Research has demonstrated differently; that most individuals who assume the mantle of leadership in a volunteer setting are often unfamiliar and a bit overwhelmed with the responsibility. While each volunteer is clearly dedicated to helping the organization succeed, most have little understanding of how to accomplish it. Providing training sessions for leaders is one strategy to help address this issue. Leadership training, however, is merely an opportunity to expose individuals to new and different ways of thinking. Adequately preparing volunteer leaders requires a series of strategies, training sessions reflecting only one of them. Leadership development is an ongoing process that includes a wide range of strategies and tactics including the following:

- training sessions
- mentoring (one-on-one support)
- manuals and guides (policy and procedure manuals, program guides, etc.)
- templates and tools (checklists, assessments, planning guides, idea menus, etc.)

### **Current Mission**

DAI/MAP recognized the need to expose those volunteers and staff of the some of the principles, processes and practices that contribute toward creating a successful organization. As such, the current mission included the following:

- conduct a leadership training conference dedicated toward examining and exploring key volunteer leadership principles, processes and practices
- conduct a half-day “coaching session” for staff designed to increase their awareness of how to design an information or education session in way to ensure participant retention

### **Leadership Training Conference**

A day-long leadership training conference was held on July 8, 2000 in Ramallah for volunteer leaders and staff from membership-based business organizations involved in the DAI/MAP Program. The overall goals of this event included the following:

- provide the opportunity for individuals from different business sectors to meet to examine, explore and discuss the common challenges and concerns faced as volunteer leaders
- gain understanding and appreciation of the commonalities and differences that exist among all volunteer leaders
- explore new and innovative strategies and techniques that can better assist them in their roles as volunteer leaders
- recognize the value of the techniques and information presented toward supporting their own business needs
- establish a unique sense of community among these volunteer and staff leaders who would see the value and benefit of meeting collectively and gaining new skills



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Three key leadership training modules were designed for this conference:

- Developing A Plan That Ensures Your Organization's Success
- Identifying, Recruiting, Motivating And Recognizing Volunteers
- From The Board To The General Assembly: Running Effective And Productive Meetings

The full-day agenda was designed to meet the unique needs of the anticipated audience (Appendix XVa, b and c). Simultaneous translation was provided enabling everyone interested the opportunity to participate. Personal invitations and promotional materials were developed to help volunteer leaders understand the nature of the conference.

Participants attended from the following organizations:

- Union of Stone and Marble
- Wood Industries Union
- Palestinian Information Technology Association
- Paltrade
- Union of Palestinian Pharmaceutical Manufacturers
- Higher Council for the Arab Tourist Industry
- DAI/MAP staff
- staff from DAI/MAP approved subcontractors

Reports received at the conclusion of the session confirmed that those attending saw value in the information shared and recognized the importance of meeting as a group. The remaining three modules are in development and scheduled for completion by the conclusion of the mission.

### **Staff Coaching Session**

Because DAI/MAP staff work most directly with volunteer and staff leaders, it was suggested that they gain insight on innovative ways to design and deliver information in ways that would ensure the highest form of retention. The four-hour session was held on July 3, 2000 for selected DAI/MAP staff focused on ways to transform information to generate understanding, gain greater appreciation among members, volunteers and leaders, and ultimately to ensure the information was retained and used to support achieving the organization's operation and mission.

Staff had an opportunity to observe many of the design and deliver techniques, used by the organizational development consultant, during the leadership training conference held later in the mission. Sessions that provide DAI/MAP staff with a greater understanding of association management, leadership development and group dynamics are important as they enable these professionals to offer even greater support and insight to the volunteer and staff leaders of the membership-based business organizations. Learning opportunities of this kind should be comprehensively defined, scheduled annually, and delivered with appropriate follow-up to ensure concepts, ideas and practices are reinforced and retained.

### **Recommendations**

Leadership development is an area often ignored or given limited attention. Yet, the future of the organization rests on the talent, skill and expertise of those willing to serve in volunteer and staff leadership positions. DAI/MAP could provide a great service to these organizations by assuming the role until such time as these organizations have developed a greater sense of self-reliance and sustainability. In many ways it has assumed this role naturally as a result of DAI/MAP's overall project goal. Should DAI/MAP decide to focus on developing a more formal program, it should consider the following:

- develop a comprehensive three-year leadership development plan that includes a wide range of development strategies for volunteer and staff leaders in the membership-based business organizations within the DAI/MAP project
- be sure that the plan includes a number of training transfer strategies designed to reinforce the information, techniques and tools shared
- establish performance measures that can be used as a baseline to evaluate the plan's effectiveness
- create an advisory group of volunteer leaders and staff whose major role is to review ideas or materials and provide constructive feedback

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- consider offering volunteer and staff leaders from other membership-based business organizations access to the activities and materials on a fee for service basis
  - develop at least an annual staff development training plan that provides concepts, information and techniques common to needs and expectations of staff working with membership-based business organizations
  - provide opportunities for DAI/MAP staff (in Ramallah and Gaza) to gain greater understanding of association management and leadership development by attending targeted specialty conferences in the United States (e.g. American Society of Association Executives (ASAE) Annual Conference offered annually in August or the ASAE Management and Technology Conference offered annually in December at [www.asaenet.org](http://www.asaenet.org) )
  - strengthen staffs' presentation and training skills through access to organizations specialized in training design and delivery (e.g. Creative Training Techniques at [www.creativetrainingtech.com](http://www.creativetrainingtech.com) )

## **Conclusion**

Continuing to develop the infrastructure necessary for an organization to operate effectively is a critical challenge in organizational development, and the most crucial. The DAI/MAP staff has demonstrated great perseverance and persistence in guiding and supporting these membership-based organizations toward developing important principles, processes and practices that will serve them for years to come. They are to be applauded for the results they have achieved to date in light of the challenges that come with working in the voluntary sector. These organizations began by establishing a purpose through the establishment of their mission statement. By establishing, monitoring and adjusting a detailed plan of action with an operating budget, they will outline and operate under a direction that will guide them toward self-reliance and sustainability. Taking this step will enable DAI/MAP to more clearly define the level of initial and subsequent support.

## Appendix I

### Union of Stone and Marble

### Overview of Member Services

revised version by USM 15.7.00

Member Service: USM defines a member service as anything that benefits members directly or indirectly.

#### Tangible Services (*physical programs, products or services*)

Service		Description	Members Served	Functional Area	Future Funding Source <sup>1</sup>	Current Funding Source	Staff Responsible <sup>2</sup>	Resulting Benefit
<b>1. Newsletter</b> content design printing		bi-monthly publication of news and information	all	information	dues sponsorship advertising	dues sponsored by member		Members are informed of USM activities and opportunities
<b>2. Exhibitions and Trade Fairs</b>	<b>Exhibitor</b>	exhibit USM and members at targeted domestic and international exhibitions	selected group	marketing	dues fees projects personal fee	dues fees DAI support		Physical presence promoting Palestinian stone and marble; provides legitimacy and good will
	<b>Visitor</b>		all	marketing information	dues fees	dues DAI support projects		
<b>3. Membership Directory</b>		list of member companies as per the database	all members and external audiences	information marketing	dues	dues		Opportunity to know who is in the union; used more for external exposure than internal use
<b>4. Education</b>		educational opportunities for members on technical and business topics	all members and interested professionals	information	dues fees projects sponsorships	dues fees DAI projects		Members gain or strengthen business competencies

<sup>1</sup> to be determined as member services selected and budget is developed

<sup>2</sup> to be determined

Service	Description	Members Served	Functional Area	Future Funding Source <sup>3</sup>	Current Funding Source	Staff Responsible <sup>4</sup>	Resulting Benefit
<b>5. Visa's and Travel Permits</b>	member support for obtaining travel documents; facilitation of obtaining visa and travel permits	selected group	technical affairs(?)	dues	dues		Assists members in gaining access to travel for business development; permits to Israel; Visas to other countries
<b>6. General Assembly Meeting</b>	annual meeting	all	corporate affairs information	dues sponsorship (tentative)	dues		Event where members have the opportunity to network with one another
<b>7. Industry Marketing Materials</b>	four color marketing brochure; CD-Rom, electronic, printed and product sheets for members	all	information marketing	dues fees	dues		Brochure used to supplement company's promotion to external groups
<b>8. Branch Membership Meetings</b>	routine meetings at branch level; with possibly guest speaker	regional members	corporate affairs	dues	dues		Opportunity for members to network with colleagues within their region
<b>9. Business Development Match/ Opportunities</b>	special information on trade fairs, special marketing opportunities	selected members	marketing	dues	dues fees		
<b>10. Export Development Program</b>	project with DAI; prepares member companies to prepare for exporting goods; also includes Raw Materials Export Pilot Program	selected members	marketing	dues	dues fees DAI support		

<sup>3</sup> to be determined as member services selected and budget is developed

<sup>4</sup> to be determined

Service	Description	Members Served	Functional Area	Future Funding Source <sup>5</sup>	Current Funding Source	Staff Responsible <sup>6</sup>	Resulting Benefit
<b>11. Member Survey</b>	gathering survey information on member profile and needs	all		dues	dues DAI support		provides USM with opportunity to adjust or align member services to support member need
<b>12. Insurance Program</b>	wide range of group insurance programs (car, fire, industrial, workmen's compensation, etc.)	all members		fees	fees		provides discount premium for insurance for members
<b>13. Trade Missions</b>	Visits to potential markets or to organizations for potential partnerships	selected members		dues sponsorship	dues		explore new business opportunities and joint business ventures
<b>14. USM Library</b>	contains books, videos, and other information on the topics and issues important to the industry; USM works cooperatively with other libraries (e.g. Berzeit University Library)	all members prospective members	information marketing	dues fees (certain components)	dues		information provided members to gain competencies to increase business success

<sup>5</sup> to be determined as member services selected and budget is developed

<sup>6</sup> to be determined

**Intangible Services** (*services that provide promotion, good will, assistance, image, and influence*)

Service	Description	Members Served	Functional Area	Future Funding Source	Current Funding Source	Staff Responsible	Resulting Benefit
<b>15. Advocacy</b>	represents member interests in the public sector	all	information	dues	dues		Legitimacy, influence on public policy issues and regulations
<b>16. Arbitration</b>	resolve disputes, misunderstandings among members	all	corporate affairs	dues fees (in certain cases)	dues		Enables members to find common ground for doing business
<b>17. Business Reputation</b>	Recommendation for the reliability and dependability of USM's members and clients.	all	marketing information	dues	dues		Provides professional support or business recommendations to members and non-members seeking to do business with other members
<b>18. Clearing House</b>	USM acts as an agent for inquiries received to match to the best company to get product	selected group of members	marketing	dues	dues		Members who can support these requests have the opportunity to bid for the project
<b>19. Research Project – With University</b>	project concept in development						

**Appendix II**  
**Union of Stone and Marble**

**Annual Calendar of Events** *draft 2.7.00*

Service		January	February	March	April	May	June
Newsletter			Issue Published		Issue Published		Issue Published
		Preparation		Preparation		Preparation	
Exhibition and Trade Fairs							Cararra Trade Fair
Membership Directory							
Education	Seminars	Occupational Health & Safety		Environmental Awareness/Good Housekeeping	Clearance/Customs		
	Workshop		ISO 1400				
	Training Course		Internal Auditing/Global		Italian Language		
Visa's and Travel Permits		Ongoing Support Provided As Needed					
General Assembly Meeting			Annual Meeting				
		Preparation					
Industrial Marketing Materials			Stone/Marble Brochure in English/Arabic			Stone/Marble Brochure in English Arabic and Italian	
		Preparation			Preparation		
Branch Membership Meetings		Ongoing Monthly Luncheon Meetings					
Advocacy		Ongoing Efforts As The Need Arises					

Service	January	February	March	April	May	June
Business Development Match/Opportunities						
	Ongoing As Requests Are Received					
Export Development Program				Export Program Begins		
	Ongoing For Selected Members					
Arbitration Support						
	Ongoing As The Need Arises					
Insurance Program						
	Ongoing Program – Available To Members At Any Time					
Member Survey					Survey Mailed	Survey Received
Trade Missions						Carrara & Verona



Service		July	August	September	October	November	December
Newsletter			Issue to be Published		Issue to be Published		Issue to be Published
		Preparation		Preparation		Preparation	
Exhibition and Trade Fairs				Exhibition & Trade Fair: location to be determined			
Membership Directory			Directory to be Published				
Education	Seminar	To Be Determined					
	Workshop	To Be Determined					
	Training Course	To Be Determined					
Visa's and Travel Permits		Ongoing Support Provided As Needed					
General Assembly/ Membership Meeting		General Membership Meeting					
	Preparation						
Industrial Marketing Materials			Materials Designed for ???				
Branch Membership Meetings		Ongoing Monthly Luncheons					
Advocacy		Ongoing as the Need Arises					
Business Development/ Match Opportunities		Ongoing as Requests are Received					
Export Development Program		Ongoing with Selected Members					
Arbitration Support		Ongoing as the Need Arises					
Insurance Program		Ongoing – Available to Members At Any Time					
Member Survey		Survey Analyzed					
Trade Missions		Tunisia		Verona			

### Appendix IIIb

#### Potential Areas for Developing Member Services

*Tabulation of Key Questions from Member Survey*

##### Survey Question: Problems Faced

Problems Faced	Hebron	Bethlehem	Nablus
Marketing	XXXXXXXX	XXXX	XXX
Legal	X		
Financial	XX		
Permits	XX		
Administrative	X	XX	
Maintenance	X	X	XX
Quality Control	X	X	
Vouchers/ Israeli	X		
Exports	XX		X
Tax	X		X
Water Availability	X		
Transportation	X	XX	
Security	X		
Production		XX	
Skilled Labor			XX
No Financial Facilities from the Banks			X
Bad Checks			XXXXXXXX
Low Prices			X
Updating Machinery			X
Border Problems/ Trucks			X
Low Sales			X
High Competition			XX
Taken Certificate			XX

##### Survey Question: Services Required

Services Required	Hebron	Bethlehem	Nablus
Opening New Markets	X		
Car Permits	X		
Preventing Unfair Competition	XXXX		
Training Courses	XX		
Dynamite	X		
Tax	X		
Marketing	X		X
Permits	XXX		XXXXXXXXXX
Mud	XX		
Raw Materials	X		
Markets	XXX		
Imports and Exports	XX		XXXXX
Electricity Prices	X	X	XXXXX
Customs Exports to Jordan	X		
Industrial Area Order	X		
Voucher/ Israeli	X		
Organization of the Factory		X	
Marketing Company though USM		X	
Training Center		X	
Qualify Technicians and Administrative People		X	
Unification of prices		XX	X
Not to Allow more Factories Establishment			XXXX
Contact Addresses and Catalogues			X
Financial Problems and Taxation with State Orgs			X
Labor Problems to be Solved			X
Quarries Ownership			X
Follow Up on Bad Checks			XXX

**Appendix IV**  
**Union of Stone and Marble**  
**Proposed Enhancement and Initiation of Member Services**

*draft 20-Jul-00*

**Enhancements to Existing Services**

<b>Training</b>	<b>Marketing</b>	<b>Technical Affairs</b>	<b>Corporate Affairs</b>	<b>Information</b>
Seminars	Exhibitions And Trade Fairs Industrial Marketing Matls 4-color Mktg Tri-lingual brochure Export Development Pgm Trade Missions Raw Materials Export Pgm	VISA's And Travel Permits Business Develpt Match Insurance Program Advocacy Arbitration Business Reputation Research Project with Univ	General Assembly Mtgs Branch Membership Mtgs Member Survey	Newsletter Membership Directory Clearinghouse

This report outlines a wide range of new and enhanced member services designed to support the challenges and needs of USM members. In building a set of member services perceived valuable by the membership, USM needs to take the following steps:

- identify the current level of staff resources
- identify the amount of time required to support current services
- identify those new services or enhancements to current services that is immediately responsive to member challenges and needs
- establish time and resources (financial and human) required to incorporate these services into the normal organization's operations
- create proposal outlining program objectives, methodology (how the program will operate), policies and procedures, a work plan along with a time line detailing the preparation phase, pilot implementation phase, preliminary evaluation phase, and full implementation phase

Depending on the level of support provided, USM may be able to provide from three to five new services (depending on the complexity of the service) along with three to five enhancements to current services per year.

## Functional Area: Training

### 1. Service: Seminars

<b>Current</b> Seminars are scheduled as the need arises.	<b>Proposed</b> Create an annual education calendar that offers four types of learning opportunities.
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#### Description

Full day sessions designed in the following way:

- topics relative to member need relevant to all members (small, medium and large)
- planned regardless of participation in exhibitions and trade fairs/missions
- offer at least 4 per year
- promote to members and non-members
- secure well-known (national or international) or respected presenter
- invite key national contacts as incentive for members to attend
- invite prospective members and use event as recruitment strategy
- charge registration (additional cost for non-members)
- ensure handouts prepared have immediate application
- conduct evaluation to plan for future courses

#### Proposed Income

4 sessions x 30 participants x xxxNIS = xxx NIS annual income

*(note: to circumvent having to hire staff to do this; consider establishing partnership with key group well-known and respected for delivering education; association generates % of proceeds)*

### 2. Service: Half-day Sessions (Branch Level)

<b>Current</b> Nothing offered at this point.	<b>Proposed</b> Branches offer half-day training/learning opportunities on topics specific to local and regional needs.
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#### Description

Sessions designed in the following way:

- sessions scheduled regardless of participation in exhibitions and trade fairs/missions
- offer at least 4 per year, but not in competition with those offered by Central Office
- secure well-respected local, regional or national speaker to keep costs at a minimum
- invite key local contacts as incentive for members to attend
- charge registration fee (additional cost for non-members)
- ensure handouts have immediate application for use on the job conduct evaluation to guide future programming

#### Proposed Income

4 sessions x 15 participants x 3 branches x xxxNIS = xxxNIS annual income

### 3. Service: Business Development Clinics

<b>Current</b> Nothing offered at this point.	<b>Proposed</b> Two-three month (8-12 week) course offering education and direct application support on specific business development topics.
<b>Description</b> Sessions designed in the following way: <ul style="list-style-type: none"><li>▪ participants attend one day per week with opportunity to use information in applied way throughout the week</li><li>▪ offer twice per year</li><li>▪ target content toward small and medium-sized companies</li><li>▪ provide in cooperation with university or training facility</li><li>▪ certificate awarded upon completion of course</li><li>▪ invite members and non-members to attend</li><li>▪ charge registration fee (more for non-members)</li><li>▪ consider having members/non-members submit application for participation</li><li>▪ use as recruitment strategy to gain new members</li><li>▪ possibly seek support from vendors to offer scholarships to members</li><li>▪ members may obtain small rebate upon completion of course (as incentive to attend)</li></ul>	

#### Proposed Income

2 sessions/year x 10 participants x xxxNIS (or scholarship) = XXX NIS annual income

### 4. Service: Roundtables (Branch Level)

<b>Current</b> Nothing offered at the current point.	<b>Proposed</b> Two-hour sessions offered as value-added session to scheduled membership meetings.
<b>Description</b> Sessions offered in the following way: <ul style="list-style-type: none"><li>▪ session facilitated by professional (gives opportunity for vendors to be visible to members)</li><li>▪ session topics reflect opportunity to explore new ways of thinking, new techniques or opportunity for participants to consider alternative solutions to current problems</li><li>▪ schedule at least 4 roundtables per year per branch</li><li>▪ invite members and non-members to attend</li><li>▪ use as recruitment strategy to gain new members (or bring back unpaid members)</li><li>▪ charge small registration fee to get participants to make a nominal financial commitment to attend</li></ul>	

#### Proposed Income

4 sessions/year x 3 branches x 10 participants x XXX NIS = XXX NIS annual income

## Functional Area: Marketing

### 5. Service: Exhibitions And Trade Fairs

<b>Current</b> Members are contacted for participation; information about the exhibitions and trade fairs are posted in the central and branch offices.	<b>Proposed</b> Increase communication to all members of the opportunities of attending or participating in the trade fair.
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#### Description

Program would operate in the following way:

- Annual calendar of trade fairs posted
- on the website
  - in the newsletter

Offer an exhibition preparation package for companies interested in participating. Consider charging a slight fee to recover costs for a service that is not designed to support the majority of members, yet offers a convenience for members.

#### Proposed Income

$X \text{ members exhibiting/year} \times X \text{ number of exhibitions} \times XX \text{ NIS} = XXX \text{ annual income}$

### 6. Service: Industrial Marketing Materials

<b>Current</b> USM offers members two generic pieces that help market the stone and marble sector:  1. General marketing piece highlighting the sector and the union (English only)  2. Multi-lingual piece promoting the sector and the union (English, Arabic, Italian)	<b>Proposed</b> Create an “export marketing materials” package consisting of these promotional materials along with a few other key tools (e.g. checklist of ideas on how to use it to increase the visibility of the business).
--	---

#### Description

Continue offering to members at a nominal cost to cover future reprint costs. To simplify orders, consider the following:

- offer and price materials in packs of 10 or 20
- create and include order form as part of the exhibition preparation kit
- establish additional promotional strategies to make all members aware of the literature and be able to order the materials for their own use

#### Proposed Income

$X \text{ number of pieces} \times X \text{ orders from members} \times XX \text{ NIS} = XXX \text{ NIS annual income}$

**7. Service: Export Development Program****Current**

Funded program provides specialty support to member companies preparing for international exportation.

**Proposed**

Part of the program includes offering education to those who are participating in the program. The proposal suggests that education will be sponsored by USM. Consider fulfilling commitment by incorporating the training needs into the education sessions listed above.

**Description**

Refer to the education offerings listed earlier in this report.

**Proposed Income**

No additional income generated from education; income generated from the EDP program will decline in the future and therefore cannot be depended upon to support Union activities.

**8. Service: Trade Missions****Current**

Leaders and members are selected to participate in hosting or participating in trade missions.

**Proposed**

No recommendations on using this service as a means for generating additional revenue for the union.

**Description**

No changes at this time.

**Proposed Income**

Not applicable.

**9. Service: Raw Materials Export Program****Current**

Conducting a pilot project with Jordan at the present time to export raw materials into the country with no customs fee.

**Proposed**

No recommendations on using this service as a means for generating additional revenue for the union

**Description**

No changes recommended at this time.

**Proposed Income**

Not applicable.

**Functional Area: Technical Affairs**

## 10. Service: VISA's And Travel Permits

### Current

Branches provide support to members in getting paperwork processed. Ability to get VISA processed is currently dependent on the personal relationships developed with key contacts.

### Proposed

Since the current system is too complex to standardize, do not consider making adjustments at this time, or charging for the service.

### Description

No changes recommended at this time.

### Proposed Income

Not applicable.

## 11. Service: Business Development Match – Special Marketing Opportunities

### Current

Informal contact with key members who might be able to fulfill requests coming into the union from outside sources.

### Proposed

This service provided as part of membership fee; promote the fact that the more information the member provides (e.g. for the database) the better the union can support them and inform them of individuals seeking support.

### Description

Continue collecting information for the membership database that allows USM staff to know more about the member's company, product line and product capability. This enables USM to provide stronger support to its members when calls are received.

### Proposed Income

Continue offering this service as part of the dues-based membership.

## 12. Service: Insurance Program

### Current

Group insurance programs (all but life) offered to members at a competitive price. Current income generated from member participation has been disappointing.

### Proposed

Currently unclear how much money is generated but potential for growth may exist as promotional efforts have been limited thus far.

### Description

Consider working with the insurance company to develop a promotional plan that includes the following:

- a. personal visits by insurance agents to targeted current and prospective members (accompanied by current member or staff) to explain program, build relationships, and answer questions.
- b. provide sponsorship in the following way:
  - a. educational grants to cover registration fees for members with limited funds
  - b. sponsor issue of the newsletter (and insert special flyer about the insurance program)
  - c. donate money to secure a unique item to be awarded as a prize or prizes for those members who recruit new members (either the member who recruits the most or through raffle)

### Proposed Income

Premium (contractually determined – currently 5% of the contract)  
Sponsorship: to be determined



**13. Service: Advocacy**

<b>Current</b> USM provides ongoing support toward advocacy of member issues.	<b>Proposed</b> Consider establishing a political action fund that allows for members to contribute through donations or participation in special events to support the efforts of the union in dealing with legislative or regulatory issues; consider conducting two fundraisers per year to support the legislative and regulatory activities.
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<b>Description</b> Special event might include dinner in which a highly respected member is “roasted” or honored. Cost for the dinner exceeds the actual amount, balance of the registration is dedicated toward the budget. Another possible fundraiser is a silent auction (members donate items or vendors donate products or services); at a special event (e.g. general assembly meeting), members may bid silently (by placing bid on a sheet of paper) for the item – the member with the highest bid at the end of the allotted time period wins the product or item or service. Another idea is to conduct a 50/50 rally where money is collected during an event and the names of those participating is put in a raffle bowl. Half of the money is awarded to one name (or more depending on the mood of the organizers) that is pulled from all those who gave money. All the money raised becomes part of the association’s income.
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**Proposed Income**

Fundraising efforts: amount to be determined based on a set goal

**14. Service: Arbitration**

<b>Current</b> Arbitration support is provided to members who have difficulty with other members and non-members.	<b>Proposed</b> Establish this program as a fee for service with sliding scale pricing depending on the nature of the conflict.
--	--

<b>Description</b> Prices should always be established so that they will be more attractive than seeking legal support on an individual basis. More research is required before it is possible to identify level of income that can be generated.
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**Proposed Income**

To be determined

**15. Service: Business Reputation**

<b>Current</b> Union provides background checks on an informal and as needed basis.	<b>Proposed</b> This program is currently done on an informal basis and reported to be done infrequently. Do not suggest that it be formalized due to the potential libelous nature that could potentially occur.
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<b>Description</b> No detailed description offered to further support this service.
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**Proposed Income**

Not applicable

**16. Service: Research Project with University**

<b>Current</b> No current collaboration in progress with a university; but is considered an attractive strategy for the future.	<b>Proposed</b> Any effort should be fully self-funding (all direct and indirect costs including salary and benefits).
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<b>Description</b> Program description can only be outlined once USM defines an issue or topic.
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**Proposed Income**

Not applicable for budget development as a project of this kind would be self-supporting.

## Functional Area: Corporate Affairs

### 17. Service: General Assembly Meetings

<b>Current</b> Meeting with entire membership is conducted at least once per year in preparation for electing the central board of directors.	<b>Proposed</b> Consider inviting vendors to set up "table top" displays; the income generated for these displays can be dedicated toward the food and the preparing the materials for the meeting.
--	--

**Description**  
Can create a flyer that is distributed with the vendor's name, specialty, contact numbers, etc. to be distributed as a general reference sheet for use at a later time.

#### Proposed Income

$X \text{ table tops} \times 1 \text{ meeting/year} \times XXX \text{ NIS} = XXX \text{ annual income}$

### 18. Service: Branch Membership Meetings

<b>Current</b> Branches conduct membership meetings on an infrequent but as needed basis.	<b>Proposed</b> Consider using the roundtable education programs as an opportunity to hold short subsequent meetings that update members on the achievements and activities of the Union.
--	--

**Description**  
This provides the Union with a more routine opportunity to keep members informed of the achievements, activities and future plans of the Union. Consider offering supply companies the opportunity to possibly introduce the roundtable topic (and speaker) to those attending prior to the membership meeting, host a "table top" display, and speak for a few moments at the membership meeting. For that exposure, they would make a modest contribution to the Union.

#### Proposed Income

$X \text{ table tops/branch} \times 4 \text{ meetings/year} \times 3 \text{ branches} \times XXX \text{ NIS} = XXX \text{ NIS}$

### 19. Service: Member Survey

<b>Current</b> The union has recently conducted a sector and member survey to capture important data that will help better understand the needs of the sector and the Union's members.	<b>Proposed</b> Plan to conduct the survey on an annual but limited basis.
---	---

**Description**  
Focus on the following:  
Emerging member need  
Satisfaction with the level and type of services  
Preference for receiving information, participating in services, and communicating with the Union

#### Proposed Income

Not an income generating item unless USM seeks to have the project sponsored by a vendor interested in receiving the results as well.

## Functional Area: Information

### 20. Service: Newsletter

<b>Current</b> Issues are generated bi-monthly and distributed on a personal basis to members; printing is sponsored by a member or a vendor.	<b>Proposed</b> Continue producing bi-monthly issues with feature articles/information that is guaranteed to gain member attention when received.
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<b>Description</b> Determine a distribution system that guarantees all members receive the issue within one week of printing (e.g. ask insurance agents of the insurance program to visit each member and deliver the copy to the business at the same time); also consider maintaining the major sponsor – give them the greatest recognition in the issue for covering the preparation and printing costs; also consider accepting smaller sized advertisements from companies seeking to get visibility in front of these members. Offer discount rate for advertisers requesting space in multiple issues. Consider using this as an opportunity to secure advertisements from companies outside of Palestine.
---

#### Proposed Income

6 issues x sponsorship fee (actual printing value) = annual income AND  
6 issues x 4 advertisement spaces x XXX NIS = annual income

### 21. Service: Membership Directory

<b>Current</b> USM printed a glossy four-color catalogue a few years ago; current plan is to provide a simple directory for distribution to possible investors and other potential international business contacts.	<b>Proposed</b> Consider creating a directory that provides information about the members that would help vendors build more effective business and marketing plans.
--	---

<b>Description</b> Package the information and sell it to businesses that are interested in selling to the current stone and sector marketplace. Also consider distributing the information to members to allow for networking (for subcontracting purposes) and as such solicit the opportunities for vendors to buy from the limited ad space provided. Consider using this as an opportunity to secure advertisements from companies outside of Palestine.
--

#### Proposed Income

10 advertisements x XXX NIS rate = annual income  
10 businesses x XXX NIS purchase price for the directory = annual income

### 22. Service: Clearinghouse

<b>Current</b> USM acts as an agent when outside requests are received to purchase products; USM recommend several members as potential suppliers	<b>Proposed</b> A service of this kind is difficult to quantify; therefore should be offered as a member service covered by the dues.
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<b>Description</b> This type of service is more referral-oriented rather than product-oriented. USM staff need to develop an awareness of the wide range of information and contacts available to direct member inquiries.
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#### Proposed Income

Dues supported project.

## Year 1- Consideration of New Services

### 23. Service: Business Discount Programs

<b>Current</b> Nothing currently offered.	<b>Proposed</b> Business discount services offer members the opportunity to access products or support at a reduced rate.
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<b>Description</b> The reduction is often established as a result of the size of the association's membership and projected participation. Some programs use additional factors such as credit history, business reputation and risk analysis to determine rates. The contractual arrangement often requires the service to absorb the cost of promotion of the service to the members in addition to remunerating a specific fee to the association (elements are dependent on the type of service and overall income generated). The following types of discount services are offered for consideration. Of those listed, only two or three should be selected each year and introduced as a new service for the members. At the present time, many of these services could be provided through another organization (e.g. Paltrade) and made available to all Union members by virtue of USM's organizational membership. Credit Card Business Loans Gasoline and Petrol Products Cellular Phone and Air Time Travel Discount Professional Services Discount Program Marketing Professionals (marketing support and promotional literature) Production and Maintenance Consultants Translation Support Business Planning Consultants
--

### **Proposed Income**

Potential income to be generated ranges depending on product, use, and negotiated agreement.

#### 24. Service: Business Services

<b>Current</b> Nothing currently offered.	<b>Proposed</b> Wide range of product-based or information-based services that help save time and money for members.
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<b>Description</b> Business services are those programs, products and events that enable members to save time, save money, or make money. They can be product-based or information-based but provide a direct benefit to the member.  <b>Procurements</b> (raw materials, office equipment, computer equipment, etc.) Maximize the opportunity to lower unit prices for the purchase of commonly used items (abrasives, office products, etc.). The Union could facilitate the development of a private company that could conduct this type of purchasing and gain additional remuneration as a result. Amount of income to be generated could be established on a percentage basis.  <b>Reports</b> (e.g. economic forecast, business planning, compensation studies for staff specialists, etc.) Identify and develop reports focused on topics of greatest interest to members for use in planning, budgeting, production, management, etc. Reports can be generated through a sponsorship, grant or normal budget process, then produced and sold to members (and non-members at a higher price).  <b>Member's Home Page on the Association Website</b> Some members have developed their own website, however, many members have yet to understand the value it can have for their businesses. Consider offering members the opportunity to build a support page for their business off their name on the membership directory. For the convenience of having such a page, they would pay a fee (either annual or monthly) to cover the cost for development, storage on the website and receiving reports (number of visits, etc.). This would enable more small and medium sized members to market their businesses to domestic and international professionals seeking services they can provide.  <b>Business Forms Package (tax department forms, invoices, sample contracts, etc.)</b> Create a list of common forms for members that would help save time, save money and increase their professionalism with clients. This package of forms would include masters that could be reproduced on a copy machine or it could contain a set quantity (decision to be made during development based on member need). The package would be sold for a nominal fee (but significant increase in fee for non-members), just above cost to allow for the Union to recoup its developmental costs and generate revenue for the association.  <b>Affiliation with Testing Companies</b> Establish working relationship to get members a discount on getting raw materials and products tested to confirm deliverable to international customers reflects require specifications. This type of project might be of greatest interest to medium and large companies	
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#### **Proposed Income**

Potential income to be generated ranges depending on product, use, and negotiated agreement.

#### 25. Membership Card Value-Added Discounts

<b>Current</b> Nothing offered currently.	<b>Proposed</b> Members enjoy discounted services at participating businesses in the area by virtue of showing their membership card.
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<b>Description</b> These services often generate no additional fee for the association, but offer an opportunity to provide additional services often not related to the sector. Assorted businesses are asked to offer special discounts to those members who show their membership card (e.g. discounts at restaurants, food stores, department stores, etc.). The discount is provided at the time of purchase. All that is required is for the member to show his/her membership card. The companies are asked to pay an annual participation fee. The Union promotes these businesses on a routine basis and encourages members to frequent the establishments. Members who offer special services that fit this criteria are invited to participate at a reduced fee.	
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#### **Proposed Income**

Potential income to be generated ranges depending on product, use, and negotiated agreement.

**Subsequent Year Plans – Year 2 and 3**

Member service programs often require a significant amount of time to achieve the desired level of participation. Programs of this kind require consistent and ongoing promotion to capture the members' attention and cultivate their awareness of how to use the services to positively impact their businesses. Before launching into a suggested set of services for year two and three, it would be prudent to evaluate the performance of the set of recommended enhancements and new ideas designed to satisfy members and generate income for the organization.

## Appendix V

### Union of Stone and Marble

draft 22.7.00

### Functional Areas of Responsibility

*This chart reflects a suggested development schedule for the introduction of new services into the USM. Services are sorted by functional area.*

<b>Executive Director</b>				
General Management and Administration Advocacy		Business Devlpt Match/ Special Marketing Opportunities Business Reputation Research Project (w/Univ)		
<b>Training</b>	<b>Marketing</b>	<b>Technical Affairs</b>	<b>Corporate Affairs</b>	<b>Information</b>
<b>Year 1 -- Enhance Current Services</b>				
Seminars, Workshops & Training Programs	Exhibitions & Trade Fairs Industry Marketing Matls Export Devlpt Program Trade Missions Raw Materials Export Pgm	Arbitration Clearing House Visa's and Travel Permits Insurance Program Member Services Devlpt	General Assembly Meeting Member Survey Branch Membership Meetings Membership Development	Membership Directory Library – Printed Material Newsletter
<b>Year 1 Additions<sup>1</sup></b>				
Full Day Sessions Half Day Sessions (Br) Business Devlpt Clinics Roundtables (Br)		Business Discount Pgms Gas Discount Program Bank Credit Program Cellular Phone Program/ Air Time Professional Services Pgm Marketing Translation Business Services Reports Business Forms		Website Marketing Opps for Members  Member Card Value-Added Discounts Restaurants  Library Web-based support
<b>Year 2 Additions</b>				
		Business Discount Program Credit Card Travel Discounts Professional Services Pgm Production/Maintenance Business Svcs Procurements		Website Website Devlpt -- Greater Support Member Card Value-Added Discounts Food stores Car Repair
<b>Year 3 Additions</b>				
Education at Regional Conference	USM sponsored Regional Conference/Exhibition (2 day)	Professional Services Pgm Business Planning		Library – Research Support for Mbrs

<sup>1</sup> USM selects three to five new services annually depending on resource support and time availability.

**EXPENSES**

Budget Item	Overall Admin	Newsletr	Exhib/Trd Fair	Memb Directory	Ed Program	Visa's	Genl Assemb	Ind Mktg Mat	Branch Mtgs	Bus Dvlpt	Bus Opps
Salary											
Benefits											
Phone/Fax/Internet											
Office Supplies											
stationery											
office items											
Reproduction											
copying											
printing											
Postage											
newsletter											
correspondence											
other											
Professional Support											
legal											
accounting											
other											
Consultation											
consultants											
contract labor											
other											
Promotion											
design											
formatting											
editing											
translation											
printing											
other											
Publication Devlpt											
design											
formatting											
editing											
translation											
printing											
other											



	Overall Admin	Newsletr	Exhib/Trd Fair	Memb Directory	Ed Program	Visa's	Genl Assemb	Ind Mktg Mat	Branch Mtgs	Bus Dvlpt	Bus Opps
Orgn'l Memberships											
Books/Magazines											
Payments											
banks											
loans											
insurance											
Travel											
local/ground											
distance											
Staff Dvlpt/Train											
Utilities											
rent											
electric											
water											
other											
Equipment											
major											
minor											
Miscellaneous											
Total											

INCOME											
Membership Fees											
Service Fees											
Grants											
Donation											
Sponsorship											
Other											
Total											

EXPENSES

Budget Item	Ex Dev Pgm	Mem Survey	Ins Program	Trade Mission	Library	Advocacy	Arbitration	Bus Reput	Clearing Hse	Grand Total
Salary										
Benefits										
Phone/Fax/Internet										
Office Supplies										
stationery										
office items										
Reproduction										
copying										
printing										
Postage										
newsletter										
correspondence										
other										
Professional Support										
legal										
accounting										
other										
Consultation										
consultants										
contract labor										
other										
Promotion										
design										
formatting										
editing										
translation										
printing										
other										
Publication Devlpt										
design										
formatting										
editing										
translation										
printing										
other										

	Ex Dev Pgm	Mem Survey	Ins Program	Trade Mission	Library	Advocacy	Arbitration	Bus Reput	Clearing Hse	Grand Total
Orgn'l Memberships										
Books/Magazines										
Payments										
banks										
loans										
insurance										
Travel										
local/ground										
distance										
Staff Dvlpt/Train										
Utilities										
rent										
electric										
water										
other										
Equipment										
major										
minor										
Miscellaneous										
Total										

<b>INCOME</b>										
Membership Fees										
Service Fees										
Grants										
Donation										
Sponsorship										
Other										
Total										

## Appendix VIb Union of Stone and Marble

## Budget Development Sample

The following hypothetical example reflects the level of detail an organization should take in building its operational budget. This serves as a sample for reference only and should not be replicated directly in USM's budget development efforts. While it is comprehensive it is not complete. Additional expense or income items may be needed by the organization developing the budget. The definitions for creating the cost factors are not based on any accepted accounting principles. The organization may choose to use those definitions that best support its needs.

**Member Service** Full-day Education Seminars  
**Objective** Conduct four (4) full day education sessions per year.

### Anticipated Annual Budget Worksheet (in USD)

	Salary
Staff Allocation of Time x Annual Salary = Amount Staff Salary Dedicated to This Project 25% staff allocation x \$25,000 annual salary = \$ 6,250.00	\$6,250.00

	Benefits
Benefits can be determined in many ways; if there is a desire to estimate the true cost of a program, the benefits should be included; in the USA, benefits are considered to be at least 20% of the salary.  \$6250.00 annual salary dedicated to this project x 20% to cover benefits = \$1,250.00	\$1,250.00

	Phone/Fax/Internet
Utilities of this kind are often charged a flat annual fee based on the annual cost; organization needs to decide the financial policy for this type of budget expense. Long distance or other unique charges are often debited against the account itself. Monies should be set aside to anticipate such costs.  \$ 400 annual phone cost per program + (\$ 15/mo long distance/fax x 12 months) + (\$4/mo internet fee x 12 months) = annual cost  \$400 + \$180 + \$48 = \$628.00 annual cost phone/fax/internet	\$628.00

	Office Supplies
Office supplies include all the items necessary to run the office for this program including: paper clips, pens, paper tablets, flip chart paper, loose paper, tape, desk items, printer toner, etc. Without a history of usage, it is difficult to estimate need. Consider the cost of the most expensive items and determine the quantity needed per year (e.g. number of toner cartridges for the printer); then estimate what seems plausible for this project alone. Make the best educated guess.  cost of supplies per month x 12 months = annual office supply expense \$30/month x 8 months + \$90/month x 4 months (purchasing more expensive items) = annual cost \$ 240 + 360 = \$600.00	\$600.00

## Reproduction

<p>Reproduction includes cost of copying (not rental of copier), printing or use of any stationery items used by the project. Some organizations choose not to debit specific accounts for this while others keep very detailed accounting.</p> <p>(number of anticipated copies made per month x 12 months x unit cost for reproduction) + (number of pieces of stationery/envelopes needed annually x unit cost) = annual reproduction cost</p> <p style="text-align: center;">(80 copies/month x 12 months x \$.02/copy) + (500 pieces of stationery + 500 envelopes x 12 months x \$03/piece) = annual reproduction costs</p> <p style="text-align: center;">\$19.20 = \$360.00 = \$379.20 (round off to nearest dollar)</p>	\$379.00
--	----------

## Postage

<p>All postage must be estimated – that needed for normal monthly mailings, special overnight, courier and ground transportation as well as that needed for promotion. Promotion costs may be allocated in a special line item or outlined in detail here.</p> <p style="text-align: center;">(100 pieces normal mail/mo x 12 months x \$.33/piece) + (3 promotional mailings per seminar x 4 seminars x 300 pieces x \$.55/piece) + (3 overnight packages/month x 12 months x \$20/package) + (2 ground DHL packages/month x 12 months x \$ 10/package) = annual postage costs</p> <p style="text-align: center;">\$396.00 + \$1,980.00 + \$720.00 + \$240.00 = \$3,336.00</p>	\$3,336.00
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## Professional Support

<p>Professional support may not be required in this budget as the services are fulfilled by staff. Should the organization not be fortunate to have staff complete these tasks, it may need to allocate the annual cost for legal, accounting and other professional services across all programs, products and services.</p>	not applicable
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## Contract/Consultation Support

<p>Contract/Consultation Support should include those costs needed to conduct this program; for this project it might require honorarium for speakers.</p> <p style="text-align: center;">4 seminars/year x 2 speakers/seminar x \$500.00/speaker = annual cost \$4 x 2 x \$500 = \$4,000.00</p>	\$4,000.00
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## Education Support

<p>Education support includes rental, food, or other costs relevant to holding a seminar at a site other than the organization.</p> <p style="text-align: center;">rental space: number seminars x cost rental space food/beverage: number meals x number of seminars x unit cost x number of expected participants audiovisual needs: number seminars x anticipated AV rental costs</p> <p style="text-align: center;">(4 seminars/year x \$150 rental/day) + (2 breaks x 4 seminars x \$5.00/participant x 75 participants/seminar) + (1 lunch/seminar x 4 seminars x \$25.00/participants x 75 participants/seminar) + (\$125.00 AV rental costs x 4 seminars/year) = \$11,600.00</p>	\$11,600.00
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**Promotion**

<p>Promotion includes the design, formatting, translating (if needed), and development and printing of special materials to inform members and non members of a pending event. The costs might also include expenses to develop and buy space advertising in trade journals. This example does not reflect those costs.</p> <p>factors: 4 seminars/year --- promotional flyer/seminar --- design/formatting costs --- printing costs  design/formatting costs: 4 flyers x 20 hours design/formatting x \$35/hr = \$2,800  printing costs: 4 flyers x 300 pieces x \$1.00/printing price per piece = \$1,200.00  \$2,800.00 + \$1,200.00 = \$4,000.00</p>	\$4,000.00
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**Publication Development**

Publication development includes costs relevant to developing written publications. This line item is not applicable for this example.	not applicable
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**Organizational Memberships**

This line item reflects joining organizations that might support the project. It is not considered relevant for this example.	not applicable
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**Books/Magazines**

<p>This line item reflects the acquisition of books, magazines, newsletters and subscriptions to support the fulfillment of the objectives of this project</p> <p>(subscription costs x number of printed pieces) + (number of books x average price) = annual cost</p> <p>(\$24/year x 3 subscriptions) + (5 books x \$30 average price) = \$222.00</p>	\$222.00
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**Payments**

“Payments” refers to the repayment of loans or any type of outstanding debt. This line item is not considered applicable for this example.	not applicable
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**Travel**

<p>Travel includes the reimbursement of any ground or air travel – local or long distance that occurs as a result of this project. This example reflects local travel only.</p> <p>local: number miles/year x \$xx.xx reimbursement per mile  long distance: airfare, lodging, per diem, etc.</p> <p>45 miles/month x 12 months x \$.35/mile = \$189.00</p>	\$189.00
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**Staff Development/Training**

<p>Staff development and training reflects those external learning opportunities that are selected to help the individual successfully achieve the project’s goals. Should attending these sessions require travel, the expenses for that travel would be reflected in the travel line item.</p> <p>2 training sessions/year x average registration fee = annual amount  2 sessions/year x \$ 350.00/each = \$700.00</p>	\$700.00
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**Utilities**

Rent, electric, water and other utility costs are included in this line item. Some organizations provide a set amount to include in each project or in each department. Others carry these costs separately as within the administration budget. The decision rests with the organization of how detailed it wants to measure the cost of delivering a program. This item is not considered applicable for this example.	not applicable
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**Equipment**

Equipment is the line item to track major and minor equipment rentals and purchases including: computers, desks, chairs, bookcases, etc. For the purpose of example, this line item is not considered applicable.	not applicable
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**Miscellaneous**

This item provides for the addition of unanticipated expenses. It is not reflected in this example.	not applicable
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<b>Total</b>	\$21,554.00
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## Income

### Membership

Membership fees are not generated through this program. No income is reflected for this line item.	not applicable
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### Service Fees

This line item reflects those fees collected for the seminars.  number seminars x registration fee/members + non-members x number anticipated participants = education seminar income  (4 seminars/year x \$75/registration x 45 member participants ) + (4 seminars/year x \$125/registration x 30 non-member participants) = education income	\$28,500
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### Grants

This line item reflects income received through gift grants (or donor grant programs). Not included in this example.	not applicable
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### Donations

Donations reflect special monies given by individuals or companies with the intent of using it for specific purposes (e.g. education scholarships). For this example, no donations were solicited or received.	
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### Sponsorship

Sponsorship reflects monies given by companies seeking to support the project in return for increased exposure in front of the membership. Some organizations have developed different levels of sponsorship (e.g. silver, gold, platinum levels) that provide a wide range of exposure opportunities for the amount donated.  4 seminars x # sponsorships @ available levels = sponsorship income 4 seminars x (3 silver sponsorships @ \$250 + 3 gold sponsorships @ \$ 500 + 1 platinum sponsorship @ \$750) = \$3,000	\$3,000.00
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### Other

Other is a line item that allows the organization to track unanticipated sources of income. Not applicable for this example.	not applicable
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<b>Total</b>	\$31,500.00
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<b>Net Gain</b>	\$ 9,946.00
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**Member Service**  
**Objective**

**Salary**

Staff Allocation of Time x Annual Salary = Amount Staff Salary Dedicated to This Project	
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**Benefits**

<p>Benefits can be determined in many ways; if there is a desire to estimate the true cost of a program, the benefits should be included; in the USA, benefits are considered to be at least 20% of the salary.</p> <p>annual salary dedicated to this project x 20% to cover benefits = annual cost for this project</p>	
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**Phone/Fax/Internet**

<p>Utilities of this kind are often charged a flat annual fee based on the annual cost; organization needs to decide the financial policy for this type of budget expense. Long distance or other unique charges are often debited against the account itself. Monies should be set aside to anticipate such costs.</p> <p>annual phone cost per program +  (\$ amount/mo long distance/fax x 12 months) +  (\$amount/mo internet fee x 12 months) =  annual cost</p>	
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**Office Supplies**

<p>Office supplies include all the items necessary to run the office for this program including: paper clips, pens, paper tablets, flip chart paper, loose paper, tape, desk items, printer toner, etc. Without a history of usage, it is difficult to estimate need. Consider the cost of the most expensive items and determine the quantity needed per year (e.g. number of toner cartridges for the printer); then estimate what seems plausible for this project alone. Make the best educated guess.</p> <p>cost of supplies per month x 12 months = annual office supply expense</p>	
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**Reproduction**

<p>Reproduction includes cost of copying (not rental of copier), printing or use of any stationery items used by the project. Some organizations choose not to debit specific accounts for this while others keep very detailed accounting.</p> <p>(number of anticipated copies made per month x 12 months x unit cost for reproduction) + (number of pieces of stationery/envelopes needed annually x unit cost) = annual reproduction cost</p>	
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## Postage

<p>All postage must be estimated – that needed for normal monthly mailings, special overnight, courier and ground transportation as well as that needed for promotion. Promotion costs may be allocated in a special line item or outlined in detail here.</p> $\begin{aligned} & (\text{pieces normal mail/mo} \times 12 \text{ months} \times \$ \text{ postage cost/piece}) + \\ & (\text{number promotional mailings per seminar} \times \text{number seminars} \times \text{number pieces} \times \\ & \quad \$ \text{ postage amount /piece}) + \\ & (\text{number overnight packages/month} \times 12 \text{ months} \times \$ \text{ amount /package}) + \\ & (\text{number ground DHL packages/month} \times 12 \text{ months} \times \$ \text{ amount/package}) = \\ & \quad \text{annual postage costs} \end{aligned}$	
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## Professional Support

<p>Professional support may not be required in this budget as the services are fulfilled by staff. Should the organization not be fortunate to have staff complete these tasks, it may need to allocate the annual cost for legal, accounting and other professional services across all programs, products and services.</p>	
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## Contract/Consultation Support

<p>Contract/Consultation Support should include those costs needed to conduct this program; for this project it might require honorarium for speakers.</p> $\text{number seminars/year} \times \text{number speakers/seminar} \times \$ \text{amount honorarium/speaker} = \text{annual cost}$	
--	--

## Education Support

<p>Education support includes rental, food, or other costs relevant to holding a seminar at a site other than the organization.</p> <p>rental space: number seminars x cost rental space</p> <p>food/beverage: number meals x number of seminars x unit cost x number of expected participants</p> <p>audiovisual needs: number seminars x anticipated AV rental costs</p> $\begin{aligned} & (\text{number seminars/year} \times \$ \text{ amount rental/day}) + (\text{number breaks/seminar} \times \text{number seminars} \times \\ & \$ \text{cost/participant} \times \text{number participants/seminar}) + (\text{number lunches/seminar} \times \text{number seminars} \times \\ & \$ \text{cost/participant} \times \text{number participants/seminar}) + (\$ \text{amount AV rental costs} \times \text{number} \\ & \quad \text{seminars/year}) = \text{annual amount} \end{aligned}$	
--	--

## Promotion

<p>Promotion includes the design, formatting, translating (if needed), and development and printing of special materials to inform members and non members of a pending event. The costs might also include expenses to develop and buy space advertising in trade journals. This example does not reflect those costs.</p> <p>factors: number seminars/year --- promotional flyer/seminar --- design/formatting costs --- printing costs</p> <p>design/formatting costs: number flyers x number hours design/formatting x \$amount/hr = \$annual costs</p> <p>printing costs: number flyers x number pieces x \$ price/printing per piece = \$annual costs</p>	
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## Publication Development

<p>Publication development includes costs relevant to developing written publications.</p>	
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### Organizational Memberships

This line item reflects joining organizations that might support the project.	
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### Books/Magazines

This line item reflects the acquisition of books, magazines, newsletters and subscriptions to support the fulfillment of the objectives of this project  (subscription costs x number of printed pieces) + (number of books x average price) = annual cost	
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### Payments

“Payments” refers to the repayment of loans or any type of outstanding debt.	
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### Travel

Travel includes the reimbursement of any ground or air travel – local or long distance that occurs as a result of this project. This example reflects local travel only.  local: number miles/year x \$xx.xx reimbursement per mile long distance: airfare, lodging, per diem, etc.	
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### Staff Development/Training

Staff development and training reflects those external learning opportunities that are selected to help the individual successfully achieve the project’s goals. Should attending these sessions require travel, the expenses for that travel would be reflected in the travel line item.  number of training sessions/year x average registration fee = annual amount	
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### Utilities

Rent, electric, water and other utility costs are included in this line item. Some organizations provide a set amount to include in each project or in each department. Others carry these costs separately as within the administration budget. The decision rests with the organization of how detailed it wants to measure the cost of delivering a program.	
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### Equipment

Equipment is the line item to track major and minor equipment rentals and purchases including: computers, desks, chairs, bookcases, etc.	
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### Miscellaneous

This item provides for the addition of unanticipated expenses.	
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<b>Total</b>	
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## Income

### Membership

Membership fees are not generated through this program.	
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### Service Fees

This line item reflects those fees collected for the seminars.  number seminars x registration fee/members + non-members x number anticipated participants = education seminar income	
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### Grants

This line item reflects income received through gift grants (or donor grant programs).	
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### Donations

Donations reflect special monies given by individuals or companies with the intent of using it for specific purposes (e.g. education scholarships). For this example, no donations were solicited or received.	
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### Sponsorship

Sponsorship reflects monies given by companies seeking to support the project in return for increased exposure in front of the membership. Some organizations have developed different levels of sponsorship (e.g. silver, gold, platinum levels) that provide a wide range of exposure opportunities for the amount donated.  number seminars x # sponsorships @ available levels = sponsorship income	
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### Other

Other is a line item that allows the organization to track unanticipated sources of income.	
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### Total

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### Net Gain/Loss

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**Appendix VII**  
**Union of Stone and Marble**  
**Membership Campaign**  
**Conceptual Outline**

*draft 30.6.00*

**Membership Recruitment Campaign**

**Areas of Focus:**

- Prospecting: To identify a qualified source of prospective members to contact for membership.  
Recruiting: To design an effective recruitment campaign that can be replicated as needed.  
Orienting: To establish a formal orientation program for new members to help them understand how to get the most out of their membership.

The following USM Plan Objective and Strategies will be *fulfilled* as a result of this activity:

**USM Objective 11:**

To strengthen and sustain co-operation among members and to seek to address any questions that may arise

**Strategy 4:**

To develop an effective annual recruitment campaign to achieve USM new member goals.

**Strategy 5:**

Develop an effective orientation program to help members realize how to gain the most out of their membership (including how-to member services kit and field visits).

The following USM Plan Objectives and Strategies will be *supported* by this activity:

**USM Objective 12:**

To undertake such things as may be beneficial to the Palestinian stone and marble industry in general and members' interests in particular.

**Strategy 1:**

Establish a membership database that is linked to the sector database and website.

**USM Objective 13:**

To establish an ongoing pool of volunteers and leaders prepared to support USM's vision and mission.

**Strategy 1:**

Establish a leadership development program (e.g. observing, soliciting, training and recognizing volunteers).

**Appendix VIIIa**  
**Union of Stone and Marble**  
**Membership Recruitment Campaign Overview**

*draft 1.7.00*

**New Member Goal:** 100 new members

**Time Period:** tentatively scheduled for August, 2000

**Targeted Groups for Recruitment:**

Selected prospective members

Selected unpaid previous members (will need to review the information about this group)

**Profile and Needs of These Groups:**

*Information to be provided by USM and DAI Staff*

**Key Messages:**

The following concepts should be incorporated into the printed recruitment materials as well as verbally conveyed to the prospective new members:

- The Union of Stone and Marble has increased the legitimacy of Palestinian stone and marble in the world marketplace.
- The actions of the Union of Stone and Marble facilitate the expansion of business opportunities for those companies interested in doing business in the global marketplace.
- Membership provides the opportunity to expand your current business opportunities.
- Through ongoing efforts of the Union, members have the opportunity to increase their business effectiveness.
- The Union of Stone and Marble provides the information and support necessary to support the success of your business.
- The Union of Stone and Marble represents your business needs in the political, legislative and regulatory arenas.

**Possible Themes for the Campaign:**

A theme is a common tool, used in targeted efforts like a campaign, to draw special attention to the effort. Some possible themes for USM's campaign might be one of the following:

Building Membership for the Future  
Everyone Counts and Contributes to Our Future  
Members are the Vital Link to Our Economic Future  
USM Members Build on the Future  
USM Members are the Foundation of the Industry

Making a Commitment to Business Success  
Membership: Your Ticket to Business Success  
Building on our Foundation  
Membership Means Business

**Appendix VIIIb**  
**Union of Stone and Marble**  
**New Member Recruitment Campaign**  
**Proposal**

*draft 1.7.00*

**Type of Recruitment Campaign: Member-Get-A-Member**

Members (leaders and selected members) make personal contact with prospective members, discussing the value of membership and inviting them to join the Union of Stone and Marble

**Campaign Logistics**

- USM Branch leaders who have accepted the responsibility for membership are contacted and informed about the proposed membership recruitment campaign
- USM Branches are encouraged to participate in this campaign and asked to set a goal for the number of new members they feel they can recruit over the one week period
- USM Branch leaders and selected branch members are encouraged to participate (and possibly make a commitment to recruit at least two new members during this campaign)
- To give the campaign visibility and provide some fun for the leaders and members, USM Branches will have the opportunity to compete with each other based on (actual competition to be determined – possibly percentage of growth).
- The campaign will commence with a special kick-off meeting (e.g. breakfast sponsored by a company interested in gaining visibility in front of the members) and end with a celebratory event (lunch or dinner?)
- New members will have the opportunity to join at a special one-time rate of 200 rather than 300 NIS

**Recognition/Awards**

Campaigns of this kind often include special awards designed to recognize the members' volunteer efforts.

- Those USM Branches that achieve their goal will be recognized in a special way (recognition to be determined)
- Those USM Branch that achieves the highest percentage of growth will receive a special recognition
- The USM leader or member who recruits the most new members in the branch will receive a special recognition

The recognition awards selected should reflect the culture and profile of the membership. Awards can be serious, social or silly in nature. The following awards have been used successfully by other organizations:

**Serious**

- accomplishment certificates
- trophy

**Social**

- "free dinner" certificates
- "lodging at resort" certificates

**Silly**

- losing team serves winning team at a branch meeting

### **Strategies to Maintain Momentum**

- In order to maintain momentum, USM Central Office must communicate daily with each Branch Leader and selected members to report progress
- To build a sense of competition and excitement, the results of each day's effort should be compiled and reported back to all three USM Branches
- A special "tote" board should be placed in each Branch office and in the Central office tracking the progress of the campaign daily (the board should track all three Branch offices and the total)
- The results of the efforts should be kept on the wall as a reminder of how each Branch contributed in preparation of the next campaign

### **Support and Supplies for the Recruitment Campaign**

- Special information packets will be prepared containing literature that the current member may bring and leave with the prospective member (literature should include key marketing pieces, few past issues of the newsletter and a flyer that highlights all the services available with USM membership)
- Special recruiter tool kit will be prepared that will offer the following information:
  - important issues facing the sector
  - recent USM accomplishments in serving as the representative of the sector
  - suggested approach for talking about membership in the USM
  - responses to common objections
- Mini-training session will be included as part of the kick-off to demonstrate the more effective approaches to getting prospective members to join; consider conducting a role-play of the ineffective and then the effective techniques as well as having those members who have been successful offer their tips and techniques as well
- USM staff will be available throughout the entire week offering support and encouragement to all who are involved to gain their maximum participation



## Union of Stone and Marble

### Member-Get-Member (MGM) Campaign

### Planning Checklist

Organizing a member-get-a-member recruitment campaign for new members is easy. The checklist below provides a step-by-step approach to planning a successful recruitment effort.

## Preparing for a Successful Recruitment Campaign

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- |   |   |
|---|---|
| <p>___ <b>1. Form Core Planning Team</b></p> <ul style="list-style-type: none"> <li>▪ identify key participants</li> <li>▪ orient participants to responsibilities</li> <li>▪ schedule planning meetings</li> </ul> <p>___ <b>2. Analyze Previous Recruitment Campaign</b></p> <ul style="list-style-type: none"> <li>▪ review previous campaign outline</li> <li>▪ assess results for the effort</li> <li>▪ assess number of recruiters involved</li> <li>▪ assess unanticipated opportunities/challenges</li> </ul> <p>___ <b>3. Review Available Resources</b></p> <ul style="list-style-type: none"> <li>▪ identify organization's financial resources</li> <li>▪ identify volunteer and leadership support</li> <li>▪ assess time for preparation</li> </ul> <p>___ <b>4. Set Numeric Goals and Performance Measures for the Number of New Members to be Recruited</b></p> <ul style="list-style-type: none"> <li>▪ review potential member universe</li> <li>▪ consider availability of securing names of prospective members</li> <li>▪ review size of current database of prospective/cancelled members</li> <li>▪ set realistic, yet challenging goal for number of new members to be recruited</li> <li>▪ set measures by which performance will be considered acceptable and successful</li> </ul> <p>___ <b>5. Establish Profile of Prospective Members</b></p> <ul style="list-style-type: none"> <li>▪ select/determine prospective/cancelled members to be contacted</li> <li>▪ establish profile of members (e.g. professional backgrounds, geographic area, professional needs and concerns, etc.)</li> <li>▪ confirm organization has services to meet needs of these members</li> <li>▪ determine whether organization can make adjustments to member services as needed to support needs of target group</li> </ul> | <p>___ <b>6. Determine Materials Needed to Recruit Prospective Members</b></p> <ul style="list-style-type: none"> <li>▪ identify printed materials to distribute to prospective members (brochures, applications, sample newsletters, etc.)</li> <li>▪ compile existing materials</li> <li>▪ develop new materials as needed</li> </ul> <p>___ <b>7. Schedule a Recruiter Training Session</b></p> <ul style="list-style-type: none"> <li>▪ set date for training session</li> <li>▪ identify agenda</li> <li>▪ select and secure session facilitator</li> <li>▪ determine training materials to support recruiters</li> <li>▪ prepare and produce materials for recruiters</li> </ul> <p>___ <b>8. Schedule an Orientation Session for New Members</b></p> <ul style="list-style-type: none"> <li>▪ schedule date</li> <li>▪ develop session outline designed to help new members understand how to gain the most from their membership</li> <li>▪ identify and secure presenters (e.g. leaders, volunteers, and active members)</li> </ul> <p>___ <b>9. Schedule Time to Conduct Campaign Evaluation</b></p> <ul style="list-style-type: none"> <li>▪ set criteria for evaluating success of the recruitment campaign</li> <li>▪ identify information that should be collected</li> <li>▪ set date with planning team</li> </ul> <p>___ <b>10. Create Work Plan of Tasks for Use as Management Tool During Campaign</b></p> <ul style="list-style-type: none"> <li>▪ establish working document that outlines all tasks, volunteers or staff responsible, deadline for completion</li> <li>▪ refer to document routinely to ensure tasks are being completed</li> </ul> |
|---|---|

# Designing the Recruitment Campaign

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## \_\_\_1. Identify Possible Campaign Theme

- fit theme to the chapter's personality
- consider using president's theme
- consider graphic and promotional opportunities

## \_\_\_2. Set Time Frame for the Campaign

- review results from previous campaigns
- assess potential for increased participation
- select time frame for campaign (e.g. day, week, weeks, months, etc.)

## \_\_\_3. Identify Manner of Competition Among Members

- determine best type of competition
  - individuals
  - pairs
  - member teams

## \_\_\_4. Identify Possible Incentives and Recognition for Recruiters

- determine incentives to influence competition
- determine type of recognition awards used

## \_\_\_5. Establish Key Contacts for the Campaign

- identify key volunteer or staff leaders who will serve as the primary contacts for the duration of the campaign

## \_\_\_6. Establish Key Messages to Share with Prospective Members

- identify concepts that best describes the organization to new members (e.g. membership provides the opportunity to expand business opportunities)
- incorporate these key messages into recruitment materials and share with volunteer recruiters

## \_\_\_7. Determine Campaign Policies and Rules

- identify criteria and eligibility for recruitment
- determine who is eligible to participate
- determine eligibility for recognition

## \_\_\_8. Determine Whether or Not to Hold a Kick-off Event

- decide value of launching campaign at a special meeting (e.g. membership meeting, special organization event) or schedule a time to celebrate the event on its own
- decide if VIP's should be invited to speak
- establish an agenda for the event
- decide if food should be served
- decide how the room should be decorated to best reflect the importance of the event (e.g. banners, quotes on posters, etc.)
- plan recruiter training session in conjunction with the kick-off event

## \_\_\_9. Determine How Volunteer Recruiters Will Be Kept Informed

- identify strategies for communicating with volunteer recruiters routinely throughout the campaign (in person, in print, electronically)
- decide whether or not to hold progress meetings (if the campaign length is long)

## \_\_\_10. Draft Materials as Needed

- create materials to recruit to prospective members
- create materials to support volunteer recruiters
- create materials for new member orientation session
- create or secure recognition materials

## **I**mplementing a Successful Recruitment Campaign

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### **\_\_\_1. Conduct the Campaign**

- implement the campaign logistics as planned

### **\_\_\_2. Key Contacts Provide Ongoing Support and Encouragement**

- key contacts remain in constant contact with volunteer recruiters
- maintain momentum through consistent sharing of progress and efforts of individual or volunteer recruiters
- provide ongoing encouragement to volunteers

### **\_\_\_3. Monitor Results Routinely and Make Adjustments as Needed**

- review progress making adjustments to strategies to ensure goals will be achieved

### **\_\_\_4. Collect Statistics, Testimonials, and Other Interesting Facts to Review at the Conclusion of the Campaign**

- compile statistics for reporting and evaluation purposes
- compile interesting information for use in the future to show the value of membership

## **E**valuating the Success of the Campaign

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### **\_\_\_1. Assess the Results Against Numeric Goals and Defined Performance Measures**

- determine if goal was achieved
- assess if performance measures were met
- list factors that contributed toward achieving that end

### **\_\_\_2. Identify Unanticipated Factors Supporting or Inhibiting the Campaign's Success**

- identify unanticipated factors that occurred during the campaign
- assess impact on the success or failure
- determine alternatives that could be used in the future if faced with the same problem

### **\_\_\_3. Identify Recommendations for Future Recruitment Efforts**

- establish a set of recommendations for use in future campaigns

### **\_\_\_4. Prepare Written Report for Submission to Board of Directors**

- put summary of analysis and recommendations in writing to inform current leadership and provide support toward future efforts

### **\_\_\_5. Celebrate Campaign Results**

- whether or not goals were reached, conduct a celebration
  - special meeting
  - in conjunction with current event
  - in print and electronically
- include photographs in the newsletter or on the website of volunteer recruiters and new members talking and having fun

## **Appendix X**

### **Palestinian Information Technology Association**

#### **Annual Plan**

*(with reference to the PITA Board Plan, established March 2000)*

<b>Objective #1</b>	<b>To organize, represent, and promote and support locally and internationally the interests of its members.</b>
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#### **Strategies**

1. Build market linkages by establishing programs to collect and manage information (and a database) about the sector.
2. Create programs or projects (including electronic) to share information and build greater awareness and appreciation of the IT sector with members and other targeted audiences.
3. Establish an ongoing membership development program to identify, recruit, orient, involve and renew members.
4. Identify, compile and analyze key information or elements about the sector to share with members and key audiences.
5. Create and manage membership database that links with the information database.
6. Establish, identify and communicate market opportunities for business for members locally and internationally (e.g. trade fairs/measures, etc.).
7. Create membership directory from the membership database to help members network with one another.

<b>Objective #2</b>	<b>To represent members in their relationships with the government and various agencies through effective dialogue and reasoned advocacy of the needs and concerns of its members.</b>
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#### **Strategies**

1. Establish a plan (e.g. public policy initiative) designed to influence laws and regulation (e.g. copyright laws, fair bidding practices, and intellectual property) in Palestine that promotes the growth of the IT sector.

2. Create an attractive investment environment to bring in new investment opportunities.
3. Create an education program (e.g. speaker's bureau and special presentations) to inform the general public on the impact and value of IT in their daily lives.
4. Identify key audiences to invite to selected events sponsored or attended by PITA.
5. Make appropriate (e.g personal, electronic) contacts with key decision makers
6. Identify and continue to participate in sector-related organizations to build relationships and maintain awareness of the key issues related to the IT sector).
7. Activate and maintain liaison with members (associate and full) who can rally support of members and key audiences toward legislative and regulatory issues affecting the IT sector.
8. Create an issues management system designed to monitor and track legislative and regulatory issues.

<b>Objective #3</b>	<b>To enhance market opportunities for the IT sector.</b>
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### Strategies

1. Identify, participate, and conduct international trade missions designed to support the IT sector.
2. Establish business linkages and relationships that foster market development opportunities for the IT sector.
3. Help companies prepare to be compliant with international standards in order to compete on an international level.
4. Create an attractive investment environment to bring in new investment opportunities.
5. Cooperate with Palestinian government, non-government, and private groups to initiate contact with international parties, companies or other targeted groups.
6. Explore advertisement (like print advertisements or electronic hyperlinks) as strategy to increase awareness in the local and international market.
7. Identify, participate and conduct local and international exhibitions and trade fairs to promote market opportunities.

8. Identify and participate in special export development programs that enable members to participate in export trade (e.g. programs offered by CBI).
9. Review information compiled through special export development projects and identify how to transform and share it with members and other key groups (e.g. CBI).
10. Develop tools and events that will help members communicate and promote market opportunities (brochures and marketing materials, cross-sectoral awareness conference).
11. Explore building a business center that provides support to potential investors (fax, internet, copying).

<b>Objective #4</b>	<b>To help members improve the quality of their products and to meet international standards.</b>
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#### **Strategies**

1. Identify key needs for members through routine solicitation of information (e.g. survey).
2. Establish annual calendar of education programs to support member needs (e.g. wide range of learning opportunities from roundtables, clinics, seminars and conferences).
3. Identify and incorporate the latest IT technology to deliver learning opportunities to members and other key group.
4. Establish a job referral bank to help members find qualified staff (e.g. through liaison with Universities, etc.).
5. Identify and develop linkages with research and development institutions and other institutions that establish standards.
6. Identify appropriate channels to communicate information (gained from strategy 5) to related parties.
7. Identify and facilitate the delivery of key certification training programs offered by major companies (e.g. Oracle, Microsoft, etc.) to members.
8. Establish student “coop” programs with targeted universities to promote and support quality products.
9. Review information gathered, compiled, collected or received from various learning strategies and determine how it should be transformed and disseminated to members.

**Objective #5 To uphold intellectual property rights locally and internationally.**

**Strategies**

1. Identify and implement the legislative plan as created for objective #2, strategy #1.
2. Work with executive authorities to implement legislation and ensure compliance.
3. Identify and disseminate targeted information to key parties of the impact of not addressing this issue (government, media, universities, etc.)
4. Join or cooperate with international organizations that are focused on working on the issue of intellectual property.
5. Identify and disseminate information through appropriate communication vehicles of the actions taken against those who violate existing laws and regulations.
6. Create learning opportunities for members to understand the impact of violating intellectual property.

**Objective #6 To strengthen and sustain cooperation among members and to seek to address any questions that may arise.**

**Strategies**

1. Facilitate arbitration services between and among members as needed.
2. Conduct survey as outlined in Objective #4, Strategy #1.
3. Organize and conduct formal and informal activities for members to get together.
4. Invite members and non-member to share their expertise as speakers on technology issues related to their field.
5. Strengthen commitment and involvement in PITA by using appropriate communication vehicles.
6. Examine opportunity to provide discount programs for members (e.g insurance, credit cards, cell phones and air time, phone cards, business equipment, travel/air fares, etc.)

7. Create promotional materials for PITA (e.g. certificates, stickers, bumper stickers, pins, membership cards, etc.) that members can use to demonstrate their commitment to the organization and the IT sector.
8. Develop cooperative advertising opportunities for members.

## **Objective #7 To promote and facilitate cooperation between IT companies and other sectors of the economy.**

### **Strategies**

1. Create a cross-sector awareness campaign to help other sectors realize the value and impact of IT for their businesses.
2. Establish an outreach program to develop working relationships with key business-sector organizations.
3. Identify key business and industry-related publications to insert information/have feature articles regarding opportunities for IT in Palestine.
4. Explore and identify possible joint-venture education opportunities with appropriate organizations or groups for members.
5. Select key groups for PITA to join and participate in as a member.
6. Identify key websites that PITA should create a hyperlink with as a means of developing cooperative relationships).
7. Build working relationship with the Ministry of Education (e.g. curriculum development).

## **Objective #8 To provide such services to Members as seem necessary for the achievement of these objectives.**

### **Strategies**

1. Create leadership development opportunities/programs to identify, recruit, train and recognize volunteers and future leaders.
2. Create tools (e.g. management/administrative and governance manuals) to support leaders and volunteers in fulfilling their tasks effectively.



**Appendix XI**  
**Palestinian Information Technology Association (PITA)**  
**Membership Development Efforts**

*draft 12.7.00*

**Membership Information**

Current membership: 50 (45 paid; 5 pending)

**General Profile**

**Member Types**

Full (member is generally the head of an IT-related company)

Annual fee: \$250 annually  
\$500 initiation fee

Associate Members (any company supporting IT including institutes, universities, banks, etc.)

Annual fee: \$100

Students: anyone enrolled in an IT-related field

Annual fee: \$10 (tentative fee)

Individuals: anyone interested in supporting the IT sector

Annual fee: \$25

Honorary Members: dignitaries (e.g. Minister of Trade)

Membership Year: January through December

**New Member Goal** (*based on budget requirements*)

**Targeted Groups for Recruitment**

Local Full Members 65 by end of the year  
(30 new members in 6 months)

Associate Members	Universities (IT related schools)	8
	Faculty	15
	Students	100
	Banks	10
	Total	133

**Time Period** August – September 2000

## Profile and Needs of These Groups

### Potential Market

*(projections only)*

### Full Members

Gaza	35 companies (7 members; 4 employees on average)
West Bank	80 companies (38 members; 10 employees on average)

### Characteristics

Family owned/small shops/businesses – non-specialized

Hardware sales

Mainly sell compatibles

Trying to make a living in any way

Possess a sales mindset versus an IT mindset

### Associate Members

Palestinian Market	Domestic	International
Institutions	100 (appx)	250 (appx)
Individuals	300 (or less)	5,000
Students	2,000	2,000

### Key Messages:

The following concepts should be incorporated into the printed recruitment materials as well as verbally conveyed to the prospective new members:

*the following are recommendations for PITA review*

- The Palestinian Information Technology Association serves as the organized voice for information technology needs in Palestine.
- The programs, products and services provided through PITA membership will enable members to compete successfully in the global marketplace.
- Membership provides the opportunity to expand current business opportunities.
- PITA provides accurate, timely and up-to-date information that will support support the success of your business.
- PITA represents your business needs in the political, legislative and regulatory arenas.

### Possible Themes for the Campaign:

A theme is a common tool, used in targeted efforts like a campaign, to draw special attention to the effort. Some possible themes for PITA's campaign might be one of the following:

Making a Commitment to the Future of Information	Building New Pathways through Membership
Membership: Your Portal to Success	Maximizing the Future through Membership
Membership Means Business	Excellence by Association

### **Type of Recruitment Campaign: Member-Get-A-Member**

Members (leaders and selected members) make personal contact with prospective members, discussing the value of membership and inviting them to join PITA

Who will be expected to recruit?

Staff	Executive Manager and staff	2
Board	Volunteer Leaders	7
Members	Volunteer Recruiters	5
	Total	14

### **Overview of Campaign Logistics**

- PITA leaders are encouraged to participate (and possibly make a commitment to recruit at least two new members during this campaign)
- To give the campaign visibility and provide some fun for the leaders and members, various geographic regions may compete with one another
- The campaign might commence with a special kick-off meeting (e.g. breakfast sponsored by a company interested in gaining visibility in front of the members) and end with a celebratory event (lunch or dinner?)
- recruitment efforts can be held in conjunction with current PITA special events/educational opportunities including:
  - Investment – Law Workshop
  - Taxation (August)
  - IPR

### **Recognition/Awards**

Campaigns of this kind often include special awards designed to recognize the members' volunteer efforts.

- Those members who recruit a large number of new members will be recognized in a special way (recognition to be determined)

The recognition awards selected should reflect the culture and profile of the membership. Awards can be serious, social or silly in nature. The following awards have been used successfully by other organizations:

#### **Serious**

- accomplishment certificates
- trophy

#### **Social**

- "free dinner" certificates
- "lodging at resort" certificates

#### **Silly**

- losing team serves winning team at a branch meeting

### **Strategies to Maintain Momentum**

- In order to maintain momentum, PITA Central Office must communicate daily with those members and leaders who are involved in the campaign
- To build a sense of competition and excitement, the results of each day's effort should be compiled and reported back via an email or the website to all involved
- A special "tote" board should be placed in the Central office tracking the progress of the campaign daily (the board should track all those involved as recruiters)

- The results of the efforts should be kept on the wall as a reminder of how each member contributed to PITA's growth

### **Support and Supplies for the Recruitment Campaign**

- Special information packets will be prepared containing literature that the current member may bring and leave with the prospective member (literature should include key marketing pieces, few past issues of the newsletter and a flyer that highlights all the services available with PITA membership)
- Special recruiter tool kit will be prepared that will offer the following information:
  - important issues facing the sector
  - recent PITA accomplishments in serving as the representative of the sector
  - suggested approach for talking about membership in the PITA
  - responses to common objections
- Mini-training session will be included as part of the kick-off to demonstrate the more effective approaches to getting prospective members to join; consider conducting a role-play of the ineffective and then the effective techniques as well as having those members who have been successful offer their tips and techniques as well
- PITA staff will be available throughout the entire week offering support and encouragement to all who are involved to gain their maximum participation

### **Other Considerations**

#### **Recruitment Techniques**

The other types of recruitment techniques that exist include:

Active Techniques (individual must be directly involved at all times)

Personal contact (phone, one on one)

Special event (specially planned or attended)

Passive Techniques (individual must organize the strategy, but need not be present or involved at all times)

Special Membership Promotions

Website (special section for prospective members)

Magazines (articles, advertisements)

Newspapers (articles, advertisements)

Direct Mail (personal appeal/invitation from current well-respected member)

Suggest planning several techniques at various times of the year to ensure that each month, something is happening to recruit new members.

#### **Factors to Developing a Recruitment Campaign**

(see Membership Planning Checklist for detailed support)

**Appendix XII**  
**Wood Industries Union**  
**Strategic Plan 2000 – 2002**

**Version**  
**Master Plan**

<b>Objective 1</b>	<b>To represent the wood industry sector in Palestine in its relationships with the government and various agencies, through effective dialogue and reasoned advocacy of the needs and concerns of the manufacturers.</b>
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**Strategy 1**      **Establish an effective legislative and regulatory program within the Union of Wood Industries.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Establish policies and procedures outlining how priorities are identified, managed, addressed (e.g. spokesperson), monitored and evaluated by board and staff.	6 m	Dec 00	Exec Man/DAI	
2. Establish database identifying important association and sector-related contacts for each priority area.	6 m	Dec 00	Exec Man/DAI	
3. Develop policies and procedures for communicating information and accomplishments to the membership and other targeted groups.	6 m	Dec 00	Exec Man/DAI	
4. Identify a legislative action plan outlining key steps necessary to achieve desired end results.	6 m	Dec 00	Exec Man/DAI	

**Strategy 2**      **Establish effective collaborative relationships with key sector-related individuals and groups (organizations, agencies, etc.).**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Establish policies and procedures for developing relationships with selected groups.	6 m	Dec 00	Exec Man/DAI	
2. Develop written documents of understanding for the working relationship (memorandum of understanding and letter of agreement, cooperation agreement).	As needed		Exec Man/DAI	

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<b>Objective 2</b>	<b>To establish ongoing contacts with key people of the government.</b>
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**Strategy 1**      **Provide PNA & negotiation team with updated states of sector & main issues of concern.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify key issues critical to the wood industry sector.				
2. Identify potential and current agreements & Evaluate impact on the wood industry				
3. Identify and meet with key leaders regarding adjustments to agreements as needed.				

- Evaluate results of contacts and determine next steps.

**Strategy 2      Establish and maintain communication with PalTrade.**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1.				
2.				
? ? ? ? ? ? ? ? ? ? ? ?				

**Objective 3      Establish and maintain communication with PalTrade.**

**Strategy 1      Create a new definition of the elements that comprise the wood industry sector.**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Establish an advisory committee to establish new set of elements that define the sector.	6 m	Dec 00	Exec Man/DAI	
2. Determine strategies to inform key groups of the new definition.	6-12 m	Jun 01	Exec Man/DAI	
2. Identify possible obstacles from key groups for acceptance of the new definition and create strategies to handle.	6-12 m	Jun 01	Exec Man/DAI	
3. Evaluate results and determine next steps.	12-18 m	Dec 01	Exec Man/DAI	

**Strategy 2      Coordinate with PSI & DAI on establishing the minimum and identify the maximum set of standards and specifications for the wood industries sector in Palestine that increases eligibility for exportation.**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Compile and review current set of standards and specifications for domestic and international exportation.	6-12 m	Jun 01	Exec Man/DAI	
2. <i>Identify PSI &amp; DAI contact WIU should contact regarding collaborative efforts.</i>	6 m	Dec 00	Exec Man/DAI	
3. Agree on a process for establishing standards and specifications for domestic manufacturing - Palestine.	12-18 m	Dec 01	Exec Man/DAI	
4. Determine format for reporting required standards and specifications for international exportation.	12-18 m	Dec 01	Exec Man/DAI	
5. Determine best strategy to inform and remind members of the information.	6-12 m ongoing	Jun 01	Exec Man/DAI	

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<b>Objective 4</b>	<b>To foster the development of the skills needed to promote wood production and export development, through training.</b>
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<b>Strategy 1</b>	<b>Establish an annual education program (series of educational events) to support member needs that includes options that are both on-site and in-print</b>
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Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Identify members' needs for education and training.	6 m	Dec 00	WIU Staff/DAI	
2. Establish calendar of on-site training events (see list below).	6 m	Dec 00	WIU Staff/DAI	
3. Identify and secure speakers for sessions.	6-12 m	June 01	WIU Staff/DAI	
4. Determine costs and registration fees for members and non-members.	12 m	June 01	WIU Staff/DAI	
5. Prepare and distribute promotional material to members.	12 m	June 01	WIU Staff/DAI	
6. Make contact with members as needed to promote educational events.	Ongoing	Ongoing	WIU Staff/DAI	
7. Prepare materials as needed for educational sessions.	As scheduled	As scheduled	WIU Staff/DAI	
8. Conduct evaluations of sessions, compile results and report to the board.	As scheduled	As scheduled	WIU Staff/DAI	
9. Use evaluations to identify content for future courses.	As scheduled	As scheduled	WIU Staff/DAI	
10. Establish list of educational materials (in print) needed to support member need.	As scheduled	As scheduled	WIU Staff/DAI	
11. Identify items that can be secured from other organizations and those that need to be developed by WIU.	As scheduled	As scheduled	WIU Staff/DAI	
12. Establish costs to secure or develop and determine fees for sale of material to members and non-members	As scheduled	As scheduled	WIU Staff/DAI	

**(add & modify according to outcome of the survey)**

**Topics selected thus far include:**

environmental issues (waste management)  
 language courses (English and Italian)  
 promoting business internationally (Alto livenza – Community & productive district in Italy); will use Italian presenters

**Topics to be scheduled include**

Pricing practices  
 Safety courses for the company (series of courses)  
 Industrial relations  
 Field visits to companies  
 ISO 9000 - value of becoming an ISO and what it takes  
 Internal audit training course (self-evaluation of your company)  
 Standards and specifications to prepare for international trade and marketing

**Strategy 2      Build relationships with other organizations, institutions and agencies that collect, compile and disseminate information related to the sector.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify key organizations and institutions that provide information and education related to the business sector.	6 m	Dec 00	WIU Staff/DAI	
2. Establish possible working relationships with these groups.	6 m	Dec 00	WIU Staff/DAI	
3. Prepare memorandum of understanding and letters of agreement for these groups.	Ongoing	Ongoing	WIU Staff/DAI	
4. Evaluate working relationships and make adjustments as needed.	ongoing	ongoing	Exec Man	
5. Identify key organizations representing this sector in other countries.	12-18	Dec 01	Exec Man	
6. Join and participate in the most appropriate (e.g. USA Assn., Italian Assn.).	12-18	Dec 01	Exec Man	
7. Consider participation in their trade shows, exhibitions, and general membership functions.	As needed	As needed	Exec Man	

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<b>Objective 5</b>	<b>To identify and implement short and long-term strategies for the development of export potential in the wood industries sector.</b>
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**Strategy 1      Organize trade missions to countries targeted for trade.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify targeted countries and markets	6 m	Dec 00	WIU Staff/DAI	
2. Identify objectives	6 m	Dec 00	USM Staff/DAI	
3. Set up a selection criteria for participation	6-12 m	June 01	Exec Man	
4. Identify related parties local or international for collaboration	ongoing	ongoing	WIU Staff/DAI	
5. Details and procedures for conducting and running meetings and receptions	6 m	Dec 00	WIU Staff/DAI	
6. Evaluate out comes and results	12-18 m	Dec 01	WIU Staff/DAI	

**Strategy 2      Improve policies and procedures for identifying, organizing and participating in trade fairs (e.g. manual, policies and procedures, etc.).**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify international related events	6 m	Dec 00	WIU Staff/DAI	
2. High light and prioritize them and identify the most important 3-5 events	6 m	Dec 00	WIU Staff/DAI	



- |   |         |        |               |
|---|---------|--------|---------------|
| 3. Develop a manual for trade fair preparation, participation, evaluation and follow up activities. | 12-18 m | Dec 01 | WIU Staff/DAI |
| 4. Develop procedures for informing members   | 12-18 m | Dec 01 | WIU Staff/DAI |

**Strategy 3      Create promotional materials and tools to support member participation in trade fairs (e.g. how-to-kits, magazine or newsletter for distribution.**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Identify & develop the promotional materials required	12-18 m	Dec 01	WIU Staff/DAI	
i. In general				
ii. For Padwa in specific				
iii. For Roma in specific				
Note:			WIU Staff/DAI	
For Padwa or Roma;				
1) Special issue of the news letter Arabic, English and Italian languages				
2) Brochure in Arabic, English and Italian languages for the sector & WIU				
3) List of member companies with their company profiles				
In general:				
1) Web Site				
2) 10-15 minutes documentary film (for Rattan or Palestinian design)				

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<b>Objective 6</b>	<b>To identify key target markets and to establish sector representation points in those markets.</b>
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**Strategy 1      Identify creative joint venture or collaborative opportunities to establish representation points in selected markets.**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Identify targeted markets ( Market research, Related parties )	12 m	June 01	WIU Staff/DAI	
2. Identify concerned parties for joint venture and collaboration	12-18 m	Dec 01	WIU Staff/DAI	
3. Set objectives for cooperation	12-18 m	Dec 01	WIU Staff/DAI	
4. Sign agreements with identified interested parties	12-18 m	Dec 01	Exec Man/DAI	

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<b>Objective 7</b>	<b>To participate in the worldwide network of exhibitions and conferences related to the wood industry as may be seen by the board to be beneficial to the sector.</b>
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**Strategy 1**      **Establish a comprehensive list of potential exhibitions and conferences.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify potential exhibitions & conferences regionally and internationally.	6-12	Jun 01		
2. Establish ways to inform members through a calendar that states the place & cost	6-12	Jun 01		

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<b>Objective 8</b>	<b>To serve as the principal contact for those who seek investment opportunities in the wood industry.</b>
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**Strategy 1**      **Investigate options to pursue appropriate investment opportunities.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify parties might be involved in the investigation (eg.PalTrade)	12-18 m ongoing	Dec 01	WIU Staff/DAI	
2. Sign agreement with concerned parties	12-18 ongoing	Dec 01	Exec Man/DAI	

**Strategy 2**      **Develop a process to ensure that information is shared in an equal and transparent manner with all members.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Establish criteria for informing members.	12 m	June 01	WIU Staff/DAI	
2. Identify means by which members should be informed.	12 m	June 01	WIU Staff/DAI	
3. Develop procedures to inform members about identified investment opportunities and other related activities	12-18 m	Dec 01	WIU Staff/DAI	

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<b>Objective 9</b>	<b>To establish WIU as the center of information on the Palestinian wood industry, with links to other similar databases worldwide.</b>
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**Strategy #1**      **Create a comprehensive awareness networking plan to establish WIU's image as the source of information for the wood industries sector.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify targeted groups	6 m	Dec 00	WIU Staff/DAI	
2. Identify type of information to be published and addressed for each target group	6-12 m	June 01	WIU Staff/DAI	
3. Identify the most popular magazines to issue articles and conferences to participate in ( e.g. Architectural conferences )	6-12 m	June 01	WIU Staff/DAI	

**Strategy 2**      **Establish a comprehensive library dedicated information current and future trends in the sector locally, regionally and internationally.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Collect different sectoral studies related to stone and marble industry in Palestine & other countries.	12-18 m	Dec 01	WIU Staff/DAI	
2. Identify the magazines, journals, books, hand books, and other materials or studies to be available in the library and their sources (vedio, CD, etc.).	12 m ongoing	June 01	WIU Staff/DAI	
3. Make the required subscriptions	12	June 01	WIU Staff/DAI	
4. Policies and procedures for library use	12 m	June 01	WIU Staff/DAI	

**Strategy 3**      **Establish a web Site for access by potential external markets and joint venture opportunities.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify target groups.	6-12 m	Dec 00	WIU Staff/DAI	
2. Review similar web sites.	6-12 m	Dec 00	WIU Staff/DAI	
3. Identify information to be available directly or indirectly at the Web Site.	6-12 m	Dec 00	WIU Staff/DAI	
4. Identify required options and techniques on the web site.	6-12 m	Dec 00	WIU Staff/DAI	
5. Identify subcontractor to design the web site (DAI, Paltrade)	ongoing	June 01	WIU Staff/DAI	
6. Develop a plan to update & maintain the web site	6-12 m	June 01	WIU Staff/DAI	

**Strategy 4 Establish a sector database (funded project already underway in cooperation with DAI/MAP).**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify the required information to be available on the sector database.	In place		WIU Staff/DAI	
1. Review available information from other resources ( <i>MOI</i> , MET, Chambers of commerce, PCBS and other resources)	In place		WIU Staff/DAI	
2. Validate available information.	In place		WIU Staff/DAI	
2. Design questionnaire for the conduct of a survey.	In place			
3. Analyze the results	6 m	Dec 00		
3. Identify missing information.	6 m	Dec 00	WIU Staff/DAI	
4. Design the database structure and link it with web site.	6 m	Dec 00	WIU Staff/DAI	

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<b>Objective 10</b>	<b>To promote and support locally, regionally and internationally the interests of its members and to provide such services to members as seem necessary for the achievement of these objectives.</b>
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**Strategy 1 To assess the needs and expectations of current and prospective members (getting their input on issues like treatment of waste materials, securing effective translators at a discounted price, advice on purchasing equipment, etc.).**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify current & prospective members	6 m	Dec 00	Exec Man/DAI	
2. Conduct needs assessment of current and identified prospective members after the survey	6-12 m	Jan 01	WIU Staff/DAI	
3. Identify needs and prioritize them	6 m	Dec 00		
4. Design services accordingly	12-18	Dec 01		
5. Inform members of those services on routinely basis	On going			

**Strategy 2 To improve and strengthen current services for members and introduce new services.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Asses the current services	6 m	Dec 00	Exec Man/DAI	
2. Validate and evaluate current services & introduce new ones.	6-12 m	June 01	Exec Man/DAI	

3.	Formalize them	12-18 m	Dec 01	Exec Man/DAI
4.	Inform members of those services on routinely basis	6 m-ongoing	Dec 00	Exec Man/DAI
5.	Develop procedures for evaluating them on regular basis and modify accordingly	Ongoing		Exec Man/DAI

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**Objective 11 To strengthen and sustain co-operation among members and to seek to address any questions that may arise.**

**Strategy 1 Establish policies and procedures for effective board governance.**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Identify and define the role of the board and formalize it.	6 m	Dec 00	Exec Man/DAI	
2. Review available procedures and policies; make adjustments as needed.	6 m	Dec 00	Exec Man/DAI	
3. Identify gaps.	6 m	Dec 00	Exec Man/DAI	
4. Develop required manuals for gaps.	6 m	Dec 00	Exec Man/DAI	

**Strategy 2 Establish effective policies and procedures for managing the General Assembly meeting and Election Process.**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Review current policies and procedures for general assembly meeting, election process and validate them <ul style="list-style-type: none"> <li>i. Invitation to general assembly meeting</li> <li>ii. Meeting agenda</li> <li>iii. Documents (Reports) availability</li> <li>iv. Running of the meeting</li> <li>v. Promotional materials</li> </ul>			Exec Man/DAI	
2. Formalize required policies and procedures			Exec Man/DAI	

**Strategy 3 Improve the format and distribution of at least two of WIU's communication pieces (e.g. faxnotes, newsletter, directory, etc.).**

Tactics	Time Frame	Deadline	Responsible	Anticipated Cost
1. Identify the communication pieces to be improved.	6-12 m	Dec 00	WIU Staff/DAI	
2. Review the current distribution methodology.	6-12 m	Dec 00	WIU Staff/DAI	
3. Review similar products and distribution methodology in similar institutions.	6-12 m	Dec 00	WIU Staff/DAI	

4. Specify areas of improvement and implement them.

6-12 m

Dec 00

WIU Staff/DAI

**Strategy 4 To develop an effective annual recruitment activitie\.**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Identify current members.	12 m	Jan 01	Exec Man/DAI	
1. Identify potential prospective members	12 m	Jan 01	Exec Man/DAI	
2. Set up the % increase in the membership to be achieved annually	12 m	Jan 01	Exec Man/DAI	
3. Develop an action plan to achieve required goals	12 m	Jan 01	Exec Man/DAI	
4. Assign a task force to implement the action plan	12 m	Jan 01	Exec Man/DAI	

**Strategy 5 Develop an effective orientation program to help members realize how to gain the most out of their membership (including how-to member services kit and field visits).**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1.				
2.				
3.				
4.				
5.				

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<b>Objective 12</b>	<b>To undertake such other things as may be beneficial to the Palestinian wood industry in general and members' interest in particular.</b>
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**Strategy 1 Establish policies and procedures for the effective administration and operation of the WIU office (e.g. filing, communication, human resources/personnel, accounting, etc.) (note: they have acquired an accounting database from their audit company).**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Develop administrative manual	6 m	Dec. 00		
2. Develop financial and accounting manuals	6 m	Dec. 00		
3. Develop human resources development plan	6 m	Dec. 00		

**Strategy 2      Assess the current status of WIU's office equipment and determine future needs (annually)**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Develop an inventory system for the equipment available at the WIU's office and the condition of each of them	annually			
2. Determine the future needs in compliance with the proposed future programs and plans	Ongoing			
3. Determine the financial requirements for such updating	Ongoing			
4. Determine ways of securing the required budget	ongoing			

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**SUGGESTED OBJECTIVE AND STRATEGIES NOT LISTED IN WIU BYLAWS**

**LEADERSHIP DEVELOPMENT**

<b>Objective</b>	<b>To establish an ongoing pool of volunteers and leaders prepared to support WIU's vision and mission.</b>
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**Strategy 1      Establish a leadership development program (e.g. observing, soliciting, training, and recognizing volunteers)**

<b>Tactics</b>	<b>Time Frame</b>	<b>Deadline</b>	<b>Responsible</b>	<b>Anticipated Cost</b>
1. Establish the need for volunteers	12-18 m	Dec 01	Exec Man/DAI	
2. Identify ways to communicate those needs to members	12-18 m	Dec 01	Exec Man/DAI	

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**Appendix XIII**  
**Wood Industries Union**  
**Overview of Member Services<sup>1</sup>**

*draft 15/7/00*

Member Service: WIU defines a member service as any activity that benefits members directly or indirectly.

**Tangible Services** (*physical programs, products or services*)

<b>Service</b>	<b>Description</b>	<b>Members Served</b>	<b>Future Funding Source</b>	<b>Current Funding Source</b>	<b>Staff Responsible</b>	<b>Resulting Benefit</b>
<b>Fax Notices</b>	General announcements about meeting and special activities; sent out on as needed basis	all	dues	dues		members remain informed of activities and accomplishments of the Union
<b>Membership Directory</b>	Pages provided about members, companies, phone, contact info, limited profile information	all	dues	dues		members can more easily connect with other members on relevant or similar issues
<b>Education Seminars</b>	Sporadic in the past – will look for in the future	targeted	dues	dues fee		information gained can have a positive impact on business development
<b>Visa's and Travel Permits</b>	Union picks up the paperwork; have excel program to track the paperwork; keep a database of each member and provides them a reminder when it needs to be renewed	targeted	dues	dues fee		support to obtain paperwork needed can help company save time and gain competitive advantage

<sup>1</sup> The information in this grid has been added/edited and should be reviewed by DAI and WIU for text accuracy.



<b>Exhibition and Trade Shows</b>	Opportunities for members to have space for exhibits; Egypt and Italy; Wood Union is also seeking exhibit space	targeted	dues	dues fees		increased business exposure provides opportunity for companies to generate business leads or generate better business relationships
<b>General Assembly Meeting</b>	Held twice a year; invite guest speaker to attend	all	dues	dues		opportunity for leaders to inform members on how they are guiding the development of the organization to improve the business climate for the industry
<b>Industry Sector Survey</b>	Conducting sector survey	all	DAI	uncertain		information gained can help in the development of more programs, products and services to improve the business climate
<b>Trade Missions</b>	Provide opportunity for members to visit other countries or host countries when they come	targeted	dues	dues sponsorship		increased exposure to influence future business; increase awareness of what's required to become globally competitive
<b>Networking Meetings</b>	Evening opportunities for members to join together in the evening to network	all				

<b>Short-term social networking opportunities</b>	Members meet at selected location for short period of time to socialize in the evenings	all	dues	dues		learn techniques that will make a difference in management of the business
<b>Business Development Mentoring</b>	Specialists from other countries provide support to members interested in building their businesses	targeted	dues	dues		gain business advantage by learning from successful business people

#### Future Programs

<b>Insurance</b>	All types of business insurance	all		fee		help lower business expenses by providing group coverage
<b>Electronic Membership Card</b>	Give member a prestigious feeling	all		dues		build sense of ownership and pride for the organization
<b>Travel Discounts</b>	Hotel in Egypt and Jordan; work with chamber of commerce to get WIU members included in this special package of services	targeted		fee		help lower business costs by providing group travel support
<b>Seminars on Targeted Topics Possible Clinics</b>	A schedule of educational opportunities for business development topics with more direct application of the information shared	all		fee		increase competency of owner/employees to improve business practice

**Intangible Services** (*services that provide promotion, good will, assistance, image, and influence*)

<b>Service</b>	<b>Description</b>	<b>Members Served</b>	<b>Future Funding Source</b>	<b>Current Funding Source</b>	<b>Staff Responsible</b>	<b>Resulting Benefit</b>
<b>Advocacy</b>	Support development of legislative and regulatory initiatives to support the growth of the sector	all members and non-members	dues donation	dues donation		improve business climate with introduction or adjustment of legislative or regulatory actions
<b>Arbitration</b>	Service to support handling conflict and disputes between members and non-members	targeted	dues fee	dues fee		provide guidance and support to alleviate long and unnecessary legal conflicts for members
<b>Business Development Referral</b>	Selected opportunities arise to recommend members to attend education opportunities in other countries	targeted	dues	dues		increase business competency by gaining perspective of other techniques and approaches to furniture manufacturing

Consider linkages for Universities with members in the union.

**Appendix XIV**  
**Wood Industries Union**

**Membership Needs and Services**

<b>Size</b>	<b>Needs and Concerns</b>	<b>Current Services</b>	<b>New Services</b>
<b>Large Companies</b> Characteristics 8-20 employees 17 % of the industry membership comprise 70%	<b>Unique Needs</b> Identifying and securing new export markets Training in production and administrative area Employee manual; job descriptions/ Infrastructure for managing and administrative offices Establishing a Palestinian design Need information about how to prepare paperwork and logistics for exportation to Egypt Exportation support with PNA – to build easier access to export to West Bank, Egypt, Jordan Gaza Industrial Zone ???	Education seminars Visa's and travel permits Exhibition and trade Fairs General Assembly Trade Missions Industry Sector Survey Networking Meetings Business Development Mentoring Advocacy Arbitration Business Development Referral Fax Notices	Insurance Programs Travel discounts Clinic Education Membership directory to be formatted to provide members to find those willing and able to do subcontractors; help consumers find members Business incentives to help move appropriate members to Gaza Industrial Zone Credit Programs with Banks Newsletter with advertising Discount consultation with marketing Specialists Skilled Labor Initiatives
<b>Medium Sized Companies</b> Characteristics 4-7 employees 15% of the industry members comprise a small % of the association	<b>Unique Needs</b> Establishing a Palestinian product design Strategies to increase production without increasing size Promotion in the local market only (GAZA)	Business Development Mentoring Education Seminars Visa's and Travel Permits Exhibitions and Trade Fairs (local and West Bank) Fax notices Advocacy General Assembly Industry Sector Survey Networking Meetings Arbitration	Trade missions ??? Credit Programs with Banks Special subcontracting program where large companies could develop work with medium companies Newsletter with advertising Discount consultation with marketing Specialists Clinic Education Skilled Labor Initiatives
<b>Small Companies</b> Characteristics 1-3 employees including the owner 68% of the industry members comprise little of this group	<b>Unique Needs</b> Formalizing administration and finance (currently done manually) Current promotion is word of mouth; previous customers Secure opportunities to become a subcontractor Become more aware of how the union could help them Little if any technology (computers, fax)	Education seminars Exhibition and trade Fairs (visitor) General Assembly Industry Sector Survey Networking Meetings Business Development Mentoring (by interest) Advocacy Arbitration	Business Development Referral Contracting needs Special subcontracting program where medium sized companies to work with small companies Newsletter with advertising Discount consultation with marketing Specialists Clinic Education

### **Large and Medium Concerns**

- Marketing and promotion
- Contracts
- Access of raw materials
- Unique product design
- Border problems – getting raw materials and products across the border
- Supporting suppliers so that the raw materials will always be available (wood not rattan)
- Accessing credit/loans
- Technology for design, administration and management, finance, production (also small)

### **For all Sizes**

- Marketing Promotion – in various forms
- Production – handling volume and managing
- Skilled Labor
- Financing and Credits
- Raw Materials
- Health and Safety

bamboo industry is a big factor in GAZA

### **Other Ideas for New Services**

#### **Sub Contractor Program**

Year one	share information at the office and in print; bring visibility to how the large companies are already subcontracting with medium
Year two	formalize the process medium to small
Year three	evaluate and enhance

#### **Skilled Labor Advisory Group**

Year one	meet with vocational centers to establish required standards
Year two	build a student internship program as a way to get more individuals into the business
Year three	develop job bank to match graduates (and other skilled labor) to jobs in the area

<b>9:00-9:30</b>	<b>Registration</b>
<b>9:30-9:40</b>	<b>Opening speech – Jim</b>
<b>9:40-11:10</b>	<b>Developing a Plan that Ensures Your Organization’s Success</b>

***Session focus:** An organization’s vision, mission, and goals tell prospective and current members what your organization hopes to accomplish. The focus and direction necessary to achieve those goals, however, is accomplished by developing a written plan. Discover the importance of this leadership tool to build an effective and productive organization.*

***Session objectives:** What you will gain by attending this session...*

- *Review the four roles leaders must play to effectively govern the organization*
- *Learn the elements of an effective planning process*
- *Discover how to integrate planning efforts into existing association efforts*
- *Examine how plans contribute toward building strong and productive committees*
- *Explore effective ways to monitor and evaluate the plan’s progress*

**11:10 – 11:30      Coffee break**

**11:30 – 1:00      Identifying, Recruiting, Motivating, and Recognizing Volunteers**

***Session focus:** Members bring to the organization a vast pool of skill, talent and expertise. That potential can play an important role in helping to accomplish the organization’s goals. Getting members to step forward on their own, however, is not always easy. Discover the strategies and tactics that leaders can use to build an active membership.*

***Session Objectives:** What you will gain by attending this session...*

- *Understand what motivates members to volunteer*
- *Learn the kind of efforts that invites and encourages members to volunteer*
- *Discover how to identify members who are ready to volunteer*
- *Learn how to ask members to become volunteers*
- *Learn easy ways to recognize member accomplishments*

**1:00 – 2:00          Lunch**

**2:00-3:30    Running Effective and Productive Meetings**

*Session focus: Running effective and productive meetings is the key to achieving one's goals in any setting. A well-run meeting can accomplish a great deal. The skills and techniques revealed in this session can be used in your next meeting – whether in the association or in your own business.*

*Session objectives: What you will gain by attending this session...*

- *Learn the four things that must be accomplished to ensure a productive meeting*
- *Discover how to create a meeting agenda that gets results*
- *Examine strategies for managing disruptive behavior in meetings*
- *Explore the importance of post-meeting strategies to maintain member enthusiasm and involvement*

**3:30-4:30    Discussion**